

# Advocacy

## Planning And Reference Guide

A Step-By-Step Resource For Public Housing Agencies



## Acknowledgements

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**This model document is for informational and planning purposes only and is not intended to replace or serve as legal advice. Documents ultimately used by your organization should be reviewed by your legal counsel and/or other competent advisor. This model document may not be suitable and/or appropriate for use in all situations.**

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# Welcome to the World of Advocacy!

It is more important than ever to preserve affordable housing options for families and individuals in need for generations to come. Your agency is impacted every day and in every way by local, state, and federal policy decisions; yet decision makers often have no idea what you do or how you make a difference in your community. The best way to begin making a difference is to build positive relationships and effective advocacy strategies.

In our industry, our primary purpose is to house and serve our residents. Each of us is challenged by a variety of issues. We recognize there is a limited amount of time and resources you will be able to devote to advocacy. However, we also recognize that it is critical to elevate what we do and to educate and inform decision makers and the public about the value our housing agencies bring to a community.

This *Advocacy Planning Guide* contains suggestions for responsible and effective approaches, contributions from top advocacy experts, and examples from the housing advocate community. You will find topics that will help you gain a stronger understanding of all aspects of the advocacy planning process: strategies, tips for developing policy recommendations, messages, and advocacy campaign plans. The tools, ideas, and reference materials are designed to help you develop a plan that can get you from where things are now, to where you hope they will go.

The purpose of the *Guide* is not for you to try to do everything contained inside. Begin thinking about what you can do – even if it's just one thing. You are a resource and know about the housing and development needs in your community, as well as the possible solutions that will make a difference.

Whether you're just getting started with advocacy, or you've been at it for years, this *Guide* is sure to provide some practical tips on how to improve! We encourage you to strategically engage yourself and your organization on behalf of your community. If you want to make a meaningful difference, you'll want to consider preparing your own *Advocacy Plan*. Planning ahead and scheduling some time to educate and inform can make a difference.

Remember, **your voice matters.**

## Inside the Guide

|   |    |
|---|----|
| Welcome to the World of Advocacy! .....                       | 1  |
| Advocacy Concepts .....                                       | 4  |
| What is Advocacy? .....                                       | 4  |
| What are the Rules? .....                                     | 5  |
| What is the Legislative Process? .....                        | 8  |
| What is a Policy Agenda? .....                                | 11 |
| What is an Advocate? .....                                    | 11 |
| Where Can I Find Advocates .....                              | 12 |
| What is a Coalition? .....                                    | 12 |
| What is an Advocacy Agenda? .....                             | 13 |
| What is an Advocacy Plan? .....                               | 13 |
| What is a Campaign? .....                                     | 13 |
| Planning Concepts - I.D.E.A. Approach .....                   | 14 |
| I = Identify Objectives - <i>Advocacy Agenda</i> .....        | 15 |
| Examine Your Mission Statement .....                          | 15 |
| Develop Your Vision and Values .....                          | 16 |
| Define Your Advocacy Objective .....                          | 16 |
| Set Goals for Your Venue .....                                | 17 |
| D = Design Action Steps .....                                 | 20 |
| Integrate Advocacy into Your Existing Work .....              | 20 |
| Build an Advocacy Team .....                                  | 21 |
| Identify Available Resources .....                            | 26 |
| Build Coalitions .....  | 28 |
| Research Your Venue .....                                     | 30 |
| Research Your Audience .....                                  | 31 |
| Tools To Find Your Representatives .....                      | 35 |
| Schedule Your Activities – <i>The Advocacy Calendar</i> ..... | 36 |
| Develop Effective Messages .....                              | 38 |
| Develop Effective Materials .....                             | 43 |
| Select Message Delivery Methods .....                         | 45 |
| E = Engage Your Plan – <i>Campaign Action Plan</i> .....      | 47 |
| Clarify ‘The Ask’ .....                                       | 47 |
| Four Basics for Effective Messages .....                      | 47 |
| Implementation Strategies .....                               | 48 |

|   |     |
|---|-----|
| Pull it all Together - Your Campaign Action Plan .....              | 61  |
| A = Assess and Follow Up .....                                      | 62  |
| Build Team Member Skills .....                                      | 62  |
| Assess Progress and Follow-Up.....                                  | 65  |
| Advocate Toolbox.....   | 66  |
| Existing Sources of Advocacy Material .....                         | 66  |
| Advocacy in Action .....  | 71  |
| Tools from A to Z .....   | 76  |
| A. Advocacy Agenda Checklist.....                                   | 77  |
| B. Advocacy Agenda Worksheet.....                                   | 78  |
| C. Campaign Action Plan Worksheet.....                              | 79  |
| D. Questions When Forming an Advocacy Team .....                    | 80  |
| E. Recruiting Volunteers and Advocates Form.....                    | 81  |
| F. Budget Worksheet.....  | 82  |
| G. Coalition Partners Worksheet .....                               | 83  |
| H. Recruit Coalition Interest Form .....                            | 84  |
| I. Determining Audience Worksheet.....                              | 85  |
| J. Questions to Research Your Issue .....                           | 86  |
| K. Legislator Intel Form .....                                      | 87  |
| L. Creative Message Development Worksheet .....                     | 88  |
| M. Develop a 'One-Pager' Worksheet .....                            | 89  |
| N. Questions to Research Personal Stories .....                     | 90  |
| O. Storyteller Information Form.....                                | 91  |
| P. Preparing a Message Worksheet.....                               | 94  |
| Q. Planning a Site Visit Worksheet .....                            | 95  |
| R. Setting up a Site Visit Worksheet.....                           | 96  |
| S. Invitation to Legislator Sample Letter .....                     | 97  |
| T. Developing Visit Agenda Worksheet .....                          | 98  |
| U. Writing a Constituent Letter Worksheet .....                     | 99  |
| V. Constituent Sample Letter.....                                   | 100 |
| W. Drafting a <i>Congressional Record</i> Statement Worksheet ..... | 101 |
| X. Media Sample Letter .....  | 102 |
| Y. Press Release Sample.....  | 103 |
| Z. Assess Your Progress.....  | 104 |

# Advocacy Concepts

## Learning Objectives

- Understand what advocacy is and is not
- Understand the opportunities open to agencies for lobbying
- Understand the potential implications of lobbying
- Understand the rules regarding political campaigns



## What is Advocacy?

Put simply, **Advocacy** is the act of supporting a cause. It is action directed at changing policies, positions, or programs. The Alliance for Justice suggests that advocacy is *“any action that speaks in favor of, recommends, argues for a cause, supports or defends, or pleads on behalf of others. It includes public education, regulatory work, litigation, and work before administrative bodies, lobbying, voter registration, voter education, and more.”* People often confuse advocacy with words like ‘education,’ ‘public relations,’ and ‘lobbying.’ For our purposes, let’s begin to break these terms down further.

**Advocacy** is about pleading or arguing for a specific cause. The key here is the term ‘specific.’ Effective advocacy campaigns are oriented around a need, whether it’s funding, policy change, or just attention from a decision maker. Advocates disperse information to educate and inform perceptions. To succeed, you must move public perception and decision makers beyond understanding (education) and feeling positive (public relations) about public housing. You must get them actively engaged.

**Education** involves providing general information about the services you provide in the community. The goal here is to be sure people know what you do. This means helping your audience understand your role in promoting decent, safe, affordable housing to break the cycle of poverty.

**Public Relations** can be looked at by experts in a variety of different ways. For our purposes, we’ll consider public relations to be one step beyond education. Instead of simply putting information out there, the goal in a public relations effort is to promote a positive impression. One of the strategies most associated with public relations is media

outreach, although testimonials from supporters and engagement of outside groups can be helpful as well. This might mean asking your residents to share their success stories.

**Lobbying** is even more specific than advocacy. In the vast majority of cases, lobbying is usually done by professionals whose role it is to keep track of the many legislative activities happening in a state capitol or Washington, DC. They meet individually with key legislators and staff to discuss the merits (or downsides) of specific legislation. Lobbyists may often inform about advocacy efforts. One example might include providing details on the status of legislation.

## What are the Rules?

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**Can agencies lobby?** In short, yes. Federal law clearly states that no federal funds may be used for lobbying, but ***it does not in any way restrict the agency's traditional role of educating and advocating on critical issues.*** Government officials rely on your expertise and insights! Agencies have the authority to engage in both grassroots lobbying and direct lobbying activities. However, they are not allowed to spend federal funds for certain aspects of this work. These restrictions relate to specific grants, loans, and contracts awarded by federal agencies to agencies.



A public official must adhere to any laws, rules, or controls that govern their behavior. This includes all federal and state laws, the Hatch Act, the Annual Contributions Contract (ACC), and opinions from the attorney general. As a rule of thumb, a public official should:

- Be familiar with all local, state, and federal laws they are subject to
- Avoid the appearance of impropriety and disclose any possible ethical issue
- Get a legal opinion if there are any questions about any issue
- Review the US Department of Housing and Urban Development's (HUD) *Ethics Manual* (<http://www.hud.gov/local/in/working/ph/guidance1.pdf>) regarding potential conflicts of interest

While this *Guide* provides a good outline of the general rules, it does not provide legal advice. Advocates should be aware that this can be a very complex and ever-changing area of law. When structuring interactions with members of Congress, advocates need to be careful and seek guidance from existing housing advocacy organizations or other professionals before conferring with lawmakers or other government officials.



There are two different definitions of lobbying to consider:

- **Grassroots Lobbying** relates to the government relations context, referring to the active participation of citizens in the policymaking process. This is defined by the Internal Revenue Service (IRS) more specifically as encompassing the activities an organization undertakes to ask the public (not members) to support or oppose legislation.
- **Lobbying** or **Direct Lobbying** is defined by the IRS as encompassing the activities an organization undertakes to communicate its position on legislative proposals *directly* to elected officials and to executive branch officials and their staff.

Visit the Center for Lobbying in the Public Interest at <http://www.clpi.org/> for frequently asked questions and helpful information about lobbying laws.

### Why Have I Heard I Can't Lobby?

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- The majority of restrictions on agencies in regards to federal lobbying activities relate to policies set by local and state governments. In other words, local city councils, the mayor's office, or other local officials have established internal rules regarding outreach from any local agencies, including agencies, to federal policymakers.
- While agency Executive Directors certainly must be cognizant of these rules, it is important to understand that beyond restrictions on spending federal funds for lobbying activities, the letter of the federal law does not place any additional limits on lobbying or advocacy activities beyond disclosures and registrations that apply to federal activities. However, each state has its own restrictions for lobbying state governments.

### Which Lobbying Activities Cannot Be Conducted with Federal Funds?

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Known as the 'Byrd Amendment,' Section 31 US Code § 1352, titled 'Limitation on use of appropriated funds to influence certain federal contracting and financial transactions,' spells out which specific federal actions agencies and other local governmental entities may not use federal funds for in an effort to influence the outcome.

They are:

- The awarding of any federal contract
- The making of any federal grant or loan
- The entering into of any cooperative agreement
- The extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement



The Section 1352 list does not include actions such as talking to members of Congress about overall HUD funding, seeking passage of legislation to benefit small housing agencies, supporting Community Development Block Grant (CDBG) funding, proposing improvements to the vouchers program, or any policy issue you may wish to impact. In addition, it does not include talking to agency officials about general regulatory issues unrelated to contracts, grants, loans, or cooperative agreements.

## If I Lobby, Do I Have to Register?

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Occasional communication with a member of Congress or regulatory agency will not trigger the lobbying disclosure requirement. Although somewhat hazy, agency Executive Directors and employees who spend less than 20% of their time lobbying generally do not have to register.

Given the existing responsibilities a housing agency has to meet in its primary purpose of housing people, it is not likely you can devote significant amounts of time toward advocacy efforts. However, it is important to understand if you reach this level of activity, restrictions and reporting requirements do exist. For this reason, you are encouraged to strategically consider in advance the efforts you will take, select activities that integrate with existing organizational goals, and engage in these activities in a planned and scheduled fashion.

Should you decide to hire a professional lobbyist or employee whose time will be devoted to lobbying, that person will need to register. You may also wish to become familiar with your own state requirements for lobbying at the state Capitol, as they will likely be different. This is why it's important to ask any potential lobbyists whether they are familiar with the lobbying registration process. Find more information about lobbying compliance at [lobbyingdisclosure.house.gov](https://lobbyingdisclosure.house.gov).

## Can Agencies Be Involved in Political Campaigns?

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The Hatch Act prohibits local governments and related agencies that receive federal funds from engaging in certain aspects of political campaigns.

Agency Executive Directors and employees **may not**:

- Be candidates for public office (if your salary is covered 100% by federal funds)
- Use official influence to impact the outcome of an election
- Coerce others to make contributions to a party, committee, organization, agency or other person for political purposes

However, agency employees may participate in a wide variety of activities related to elections such as voter registration efforts, attending political rallies, contributing money, or campaigning for or against a referendum. Visit [www.archives.gov/legal/ethics/hatch-act.html](http://www.archives.gov/legal/ethics/hatch-act.html) and <https://osc.gov/Pages/hatchact.aspx> for more information.

## Can Agencies Work With Non-Profit Partners on Advocacy Efforts?

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Partnering with other organizations is a great way to get your message across. Be aware that non-profit organizations face their own regulatory environment. Information about the rules of lobbying provided in this *Guide* is for informational and planning purposes only and is not intended to replace or serve as legal advice. Any documents ultimately used by your organization should be reviewed by your legal counsel or other competent advisor, as these model documents may not be suitable or appropriate for use in all situations.

## What is the Legislative Process?

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The legislative processes at both the state and federal levels are used to change, modify, or create legislation. Individuals or groups may work toward changing, modifying, or creating legislation because they feel:

- Basic needs are not being met
- People are not being treated fairly
- Resources are distributed unfairly
- Current policies or laws are not enforced or effective
- Proposed changes in policies or laws would be harmful
- Existing or emerging conditions pose a threat to public health, safety, education, or well-being

You don't necessarily need to be an expert on the policy process but you will need to understand some basic legislative processes at the federal level. As an overview, the legislative process includes:

- Introduction
- Committee consideration
- Floor consideration
- Resolving differences
- Presidential action

The Library of Congress offers online videos detailing each stage of the legislative process at <http://beta.congress.gov/legislative-process>. You can also learn more through the House Rules Committee 'Boot Camp' at [www.house.gov/rules](http://www.house.gov/rules). You can visit <http://www.ncsl.org/research/about-state-legislatures/inside-the-legislative-process.aspx> for information about the state legislative process.

## Commonly Asked Questions about the Legislative Process

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1. **Question:** How long is the legislature meeting? (time frame)  
**Answer:** Congress meets on a two-year cycle, meaning that any bills not completed by the end of the two-year session must be introduced again at the start of the next session. Note that the vast majority of bills do not move beyond introduction. State legislatures determine their own schedule.
2. **Question:** How are bills introduced? By whom?  
**Answer:** Bills are introduced by legislators themselves. At the federal level, staff of the legislative counsel's office drafts the bills.
3. **Question:** How are bills scheduled to be considered or 'calendared' at the committee and chamber level?  
**Answer:** Committee leaders determine the schedule for committee consideration. House leadership determines the schedule for floor consideration.
4. **Question:** What are the committee procedures?  
**Answer:** Committees generally hold hearings on legislative proposals and then hold what are known as 'mark-ups' to pass legislation to the next level.
5. **Question:** What is the procedure for floor amendments/debate?  
**Answer:** In the House, the Rules Committee determines how bills will be considered. In the Senate, the leadership makes this determination.
6. **Question:** Are there 'must pass' bills?  
**Answer:** Yes. Must pass bills include appropriations and budget bills. You may be able to work with a policymaker to attach your legislative initiative to them.
7. **Question:** How are differences between chambers resolved?  
**Answer:** Generally by conference committee, but sometimes chambers pass each other's bills or make small amendments that do not require a conference committee.

8. **Question:** What happens after the bill passes through the legislature?

**Answer:** The chief executive (at the federal level this is the President) will decide to either sign or veto the proposal. Vetoes are rare and Congressional overrides of those vetoes even more so.

9. **Question:** Once the bill is signed by the chief executive what happens?

**Answer:** The new policy proposal will be made part of the US code (or state if dealing with a state matter). Then it is turned over to executive branch agencies to be administered. This is where entities like HUD come into play. They are implementing laws passed by the US Congress and signed by the President. Often, the implementation of the law has as much to do with its day-to-day impact as the passage of the law itself.

10. **Question:** One of the most common questions about the process is ‘when is the most effective time to advocate?’

**Answer:** It depends. Citizens may insert their views at a variety of stages. Where you choose to do so will depend on where the bill is in the process, its likelihood for passage, who is pushing the legislation (and what they want), whether there are deadlines as well as other considerations. For example:

- Before a bill is introduced, advocates can play an important role in contacting their legislators to ask for original sponsors. This shows support for the bill early on and can have tremendous impact on its success further down the line.
- After the bill is introduced but before it is taken up by the committee, advocates can contact legislators to ask them to cosponsor. Again, this helps build momentum.
- Once a bill has been referred to committee, advocates can play a role in contacting committee members to ask them to vote the bill favorably out of committee.
- When a bill is scheduled to be considered by the whole chamber, advocates can contact legislators to ask them to support the bill.
- After a bill has been signed and is ready to be implemented by the agency, advocates can comment on proposed regulations. Participation in rulemaking and commenting on proposed rules can be very effective in directing how something is implemented. Advocacy does not stop when a law is passed.

In short, effective advocates find ways to engage the process at every stage. Planning for these contacts will help to make them as effective as possible. Keep one thing in mind: you can only influence a decision before it is made – so start advocating today!

## What is a Policy Agenda?

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Think of a **Policy Agenda** as a list of goals you want to achieve in the policy environment. It outlines the most important set of issues, problems, or subjects you would like to address on behalf of your organization in the statutory or regulatory arena. This type of agenda is something you can generally find available on the websites of housing industry groups.

## What is an Advocate?

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An **Advocate** is someone who publically supports a cause.

**Constituents** are citizens who live in the district (in the case of the House of Representatives) or state (in the case of senators) that the legislator represents. These individuals have the most influence with their respective policymakers. In fact, the most common phrase you hear in any elected official's office is 'how does this connect to my constituents?' In other words, elected officials DO listen to people in their communities.



**'Grassroots' Advocates** are citizens who are connected to an elected official's office through constituency. The term 'grassroots,' as it relates to the government relations context, refers to the active participation of citizens in the policymaking process. Taken literally, it implies the formation of ideas from the 'roots up.'

**'Grassroot Networks'** are formed when groups of citizens choose to work together for a common cause. These networks are influential in the policy process because, in a representative democracy, policymakers tend to focus their attention on those they represent. These types of networks will be essential to implementing your Advocacy Plan.

**'Grasstops'** are people in a position of power or influence at a local level. They usually have some sort of relationship with an elected official or they are an opinion leader in the community. Because of existing relationships, it is assumed they can personalize their communications.

## Where Can I Find Advocates

Individual advocates can be found everywhere – in your office, in your developments, at the grocery store – even among your friends and family!

Here are some tips on places to look for advocates:

- Residents
- Vendors
- Community gathering spots (grocery stores, diners, coffee shops)
- Community bulletin boards
- Local opinion leaders
- Local chamber of commerce
- Local business leaders that support your work
- Volunteer organizations
- Other public institutions, such as libraries or schools



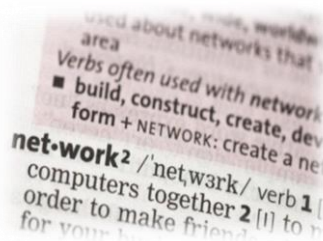
Identify and engage with these groups to find out what they'll be willing to do. You are likely surrounded by advocates – you just need to ask for their help!

Throughout this *Guide*, the 'Advocate Toolbox' image (*shown above*) alerts you that a worksheet, template, form letter or other tool is available for use in the Advocate Toolbox section. When recruiting volunteers, view the form found in the Advocate Toolbox.

## What is a Coalition?

**Coalitions**, put simply, are 'groups of groups,' such as associations, corporations, or interest groups that join together toward a common cause. Developing a coalition can give you even more access to the policymaking process.

One key role your Advocacy Team can play is to gather a variety of groups to join in support of your cause. You'll want to think about building a larger coalition in support of public housing in your community. The members of the coalition may choose to include their grassroots and grasstops networks in the coalition's overall advocacy activities.



## What is an Advocacy Agenda?

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An **Advocacy Agenda** contains what you will do and why you will do it. It defines your objectives and provides a 'big picture' view of what you wish to achieve.

## What is an Advocacy Plan?

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An **Advocacy Plan** clearly outlines what you want and how you will achieve it. It is the roadmap you will use to pursue your *Advocacy Agenda*, to set objectives and goals, and to plan actions to achieve those goals. While similar to strategic planning, advocacy planning is different in that you are defending a cause you believe is right.

Your *Advocacy Plan* guides the process of how, when, and where you intend to deliver information that educates and informs, and which decision makers, regulatory agencies, or businesses you need reach. Once your target audience is identified, you will make persuasive arguments for changes to correct unfair or harmful situation, and you may even find yourself disagreeing with policymakers – sometimes publically.

## What is a Campaign?

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A **Campaign** is an organized series of actions intended to achieve a particular objective. Campaigns have a particular area of focus, which are generally political or social.

Effective advocacy campaigns are oriented around a need, whether it's funding, policy change, or even just attention from a decision maker. To succeed, you must move decision makers beyond understanding (education) and feeling positive (public relations) about public housing. You must get them actively engaged.

There are at least two types of campaigns in an advocacy situation, specifically **policy-related** efforts vs. **public awareness**. These two approaches go hand-in-hand. Both are important to the cause and both require the same approach. The two major differences between the types of campaigns are **audience** and **action**. Understanding the difference helps you to know who you're advocating to and what you want them to do.



# Planning Concepts - I.D.E.A. Approach

Guide yourself through the planning process by following the framework below to develop an *Advocacy Plan* for your organization.

## Planning Framework

### Identify the Objectives

- Examine your Mission Statement
- Develop your vision and values
- Define the advocacy objective (*Advocacy Agenda*)
- Set goals for your venue

### *Advocacy Agenda*

### Design Actions Steps

- Integrate advocacy into your existing work
- Build an Advocacy Team
- Identify available resources (money, time)
- Build coalitions
- Research your venue
- Research your audience
- Schedule your activities (*Advocacy Calendar*)
- Develop effective messages
- Develop effective materials
- Select message delivery methods

### *Advocacy Calendar*

### Engage Your Plan

- Clarify 'the ask'
- Understand implementation strategies
- Communicate effectively
- Pull it all together (*Campaign Action Plan*)

### *Campaign Action Plan*

### Assess and Follow-up

- Build team member skills
- Assess progress
- Follow up

# I = Identify Objectives - *Advocacy Agenda*

## Learning Objectives

- Examine your Mission Statement
- Recognize how to set future direction with a vision statement
- Understand how to create *Advocacy Agenda* objectives
- Learn techniques to create more effective goals

An **Advocacy Agenda** contains what you will do and why you will do it. It provides the ‘big picture’ overview of your focus. Creating it takes you through a process of considering all that you **could do**, and challenges you to spell out what you **will do**. When you begin to plan and select activities, your *Advocacy Agenda* will provide direction to help maintain focus and prioritize resources. In this section, we will review the components of an *Advocacy Agenda*, including the Mission Statement, the vision and values statement, and the advocacy objectives and goals.



**Advocate Toolbox**  
[Advocacy Agenda](#)

## Examine Your Mission Statement

The **Mission Statement** is framed as a single sentence that captures the common purpose of the organization. It essentially outlines what the organization hopes to achieve in a general sense, and why. It identifies what your organization cares about and helps set future direction and priorities. The good news is you probably already have one.



Most housing agencies have developed a Mission Statement for their annual plan (24 CFR 903.6). You will generally find the Mission Statement prominently displayed on its website or included as required in their annual plan. Review your housing agency’s current Mission Statement for any existing advocacy element. If needed, consider how you might add advocacy in. Mission Statements are, by their nature, very broad. In general, they do not contain details on specific bills or outcomes, specific legislative environments, or the specific regulatory agencies to be addressed. Those particulars are spelled out in the organization’s goals and objectives.

## Mission Statements

A strong Mission Statement conveys what you care about as an organization.

- **Basic:** *'Our Mission is to provide safe, decent, sanitary, and affordable housing'*
- **Stronger:** *'Our Mission is to provide safe, decent, affordable housing as a platform to enhance lives'*
- **Agency Mission Statement:** *'It is the Mission of The Housing Agency to ensure the provision of quality affordable housing opportunities in viable communities for lower income households'*
- **HUD Mission Statement:** *'HUD's Mission is to create strong, sustainable, inclusive communities and quality affordable homes for all'*

## Develop Your Vision and Values

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What is your dream for the future? A **Vision Statement** can set the direction for this dream to come true by identifying how you wish to see things in the future. An example of a *Vision Statement* might be: *'Our vision is for all low and moderate income residents to live in an affordable, safe, quality house or apartment.'*

A **Values Statement** is often referred to as a 'guiding principle.' A value statement shares what your organization stands for and believes in. The *Value Statement* can be a touchstone for those representing your organization, making decisions, and interacting on your behalf. While optional, there are agencies that have developed value statements. For example, Brattleboro Housing Authority (Vermont) shares its values on their website. These values include:

- Open and honest communication, respectfulness, integrity, fairness, and responsibility
- We value each individual who participates in our programs
- We believe strongly in community, thus it is the collective well-being of each neighborhood that is of paramount importance in our deliberations and decision-making

## Define Your Advocacy Objective

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An **Advocacy Objective** is a broad statement of your general intentions. It describes the purpose your advocacy efforts will serve and the outcome your actions will be directed at achieving. An example might look something like this: *'To collaborate with others to promote policies and regulations related to the production and preservation of public and affordable housing, stabilizing communities, and sufficient funding for resident programs and services.'*

## Set Goals for Your Venue

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There are four types of goals: legislative, regulatory, public awareness, and network building. The reason for breaking down your goals into types is that each has a potentially different audience and venue – so they will have different action steps. Some examples of how steps can differ for each type are provided below.

**Legislative Goal**, e.g., preserve funding for Choice Neighborhoods Initiative at \$100M

- Meet with staff of the relevant committee
- Arrange strategy meeting with legislative champions
- Create list of grant beneficiaries highlighting the positive work that has been done
- Coordinate efforts of pro-housing coalition
- Ask advocates to create one-pager outlining benefits of programs in their communities

**Regulatory Goal**, e.g., change HUD regulation

- Gather stories outlining problems
- Review regulatory activity
- Identify specific office within HUD
- Find specific person responsible for regulation
- Meet with relevant staff
- Comment on upcoming regulatory actions

**Public Awareness Goal**, e.g., improve public perception of housing services in community

- Develop end goal of awareness campaign
- Gather positive stories
- Identify target audiences
- Identify strategies (media, in-person events)
- Have system in place to measure results

**Network Building Goal**, e.g., grow volunteer/advocate network by 20% this year

- Reach out to potential coalition partners
- Engage residents through flyers or community events
- Engage vendors
- Establish an 'each one reach one' campaign
- Solicit board engagement
- Solicit opinion leader engagement

## Make Those Goals 'S.M.A.R.T.'

**S.M.A.R.T.** is an acronym that stands for Specific, Measurable, Attainable, Realistic, and Timely. Using this goal-setting process can help you improve and clarify your goals.

The elements of the S. M. A. R. T. goal-setting process include:

|   |   |   |   |   |
|---|---|---|---|---|
|  |  |  |  |  |
| Specific  | Measurable  | Attainable  | Realistic   | Timely  |
| Objectives have to be specific and positively described                           | Establish concrete criteria for determining whether progress is being made        | Goal should be possible in the current political environment                      | Goal should be achievable given your internal resources                             | The goal has to be set within a timeframe   |

S.M.A.R.T. goal example is shown below:

*In pursuit of our objective to reduce our housing wait list by 25%, we will seek to achieve the following goals:*

- *Preserve federal, state, and local funding of current programs at existing levels, adjusted for inflation, through the next budget cycle*
- *Enhance our advocate network so that we have at least 50 advocates per congressional and state district and at least 10% of the population in our jurisdiction (for advocacy with local level governments) within the next two years*



## Pull it All Together – the *Advocacy Agenda*

It is best to coordinate your *Policy Agenda* and goals with your state or national housing industry associations. However, you will need to set your own *Advocacy Agenda* when your goal relates to a very specific local activity, such as funding from your city for a new project, or when you find associations are not addressing a policy issue you are interested in. To get a head start developing goals, take a look at the issues leading housing industry associations set forth in their legislative and regulatory agendas. Prominent associations in public housing include:

- National Association of Housing and Redevelopment Officials at [www.nahro.org](http://www.nahro.org)
- Public Housing agencies Directors Association at [www.phada.org](http://www.phada.org)
- Council of Large Public Housing agencies at [www.clpha.org](http://www.clpha.org)
- National Council of State Housing agencies at [www.ncsha.org](http://www.ncsha.org)



**Advocate Toolbox**  
[Advocacy Agenda](#)  
[Checklist](#)

A sample *Advocacy Agenda* format is provided below:

### Organization Mission

Insert the organization's overall mission here.

### Advocacy Mission (if applicable)

Insert the organization's advocacy mission here (if separate from the organization mission) and demonstrate how the advocacy work connects to the overall mission.

### Vision

Insert any broad statements of policy vision here, such as 'we support policies and initiatives that make adequate funds available for public housing, or that reduce regulatory burdens.'

### Objectives

Describe the purpose your advocacy efforts will serve and the outcome your actions will be directed at achieving such as 'Passage of [insert bill number] by 2020.'

### Goals

Identify the specific activities to be undertaken to achieve objectives. For example:  
Passage of [insert Bill number] by 2020:

1. Secure cosponsors by activating an advocacy network through action alert
2. Work with committee staff to secure testimony spot for leading organization expert
3. Insert ad into Capitol Hill newspaper in spring
4. Coordinate targeted fly-ins through spring and fall
5. Conduct organization-wide legislative day in the fall

## D = Design Action Steps

### Learning Objectives

- Examine how to integrate advocacy into your existing work
- Understand the importance of forming an Advocacy Team
- Explore how to allocate budget and time resources
- Learn ways to build coalitions
- Understand the importance of researching your audience
- Discover how to create more effective messages and materials
- Explore choices for delivering messages
- Understand the importance of an advocacy calendar for scheduling activities and follow-up



### Integrate Advocacy into Your Existing Work

One important part of developing your advocacy Mission Statement is to send a signal to your employees, leadership, and others that advocacy is an important part of what the agency does to better serve residents. It should be something that permeates every aspect of your work, from addressing the concerns of residents, to working with internal staff, to promoting the work of the agency in the community. In essence, you want to make advocacy a part of your organizational culture. Here are a few ideas on how:

- Can you find ways to make advocacy part of everyone's job? Can it be included in the job description for a position to engage in advocacy activities that address the policy needs of the organization?
- Review upcoming events to find opportunities to reach out. For example, you can invite a legislator or staff person to upcoming job fairs or community fairs
- Add an 'advocacy' topic item to every staff meeting agenda
- Ask employees to research policymakers so they can recognize them in the community
- Ask legislators or their staff to attend board and commissioner meetings

Your advocacy effort will be best served if everyone in the organization is involved from the beginning. In addition, through this process of integrating advocacy into your work, you'll start to identify those employees and others best suited to join your team.



## Build an Advocacy Team

The most important part of integrating advocacy into your work is to build a team. Advocacy can be an individual effort, or, to make a larger impact, you can ask for help. Ever hear of the old adage, *'Many Hands Make for Light Work?'*



Consider forming a team, committee, or task force in your organization. An **Advocacy Team** consists of two or more individuals interacting dynamically, interdependently, and adaptively in order to achieve specified, shared, and valued objectives. There can be a lot of activities and effort involved in the advocacy campaigns you develop.

Ultimately, who participates in your advocacy efforts is a local decision dependent upon many factors such as capacity, interest, funding availability, and administrative requirements. A team can help develop an *Advocacy Plan* or they can be utilized for specific tasks that are best accomplished through team work.

Some areas where a team can be helpful include:

- Research
- Action alert e-mail campaigns
- Attending neighborhood meetings
- Organizing register-to-vote campaigns
- Monitoring social media

A team approach can provide additional benefits, such as:

- Strengthened working relationships
- Improved performance
- Improved communication
- Increased motivation

To integrate advocacy into your organization you can engage volunteers at many levels.

- Employees – especially public relations, communications employees, or policy employees
- Senior leadership and managers
- Commissioners and resident commissioners
- Residents



### Advocate Toolbox

- [Questions When Forming an Advocacy Team](#)
- [Recruiting Volunteers and Advocates Form](#)

An ad-hoc team of some sort will probably need to be formed for the purpose of setting a vision and broad objectives. Although management might get the job done faster, it is better – for the sake of getting everyone to buy in – to have broad-based involvement in the process. This reduces the chances of putting together a program that doesn't jive well with the actual issues your organization faces.

### Steps to Form a Team

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- Solicit/invite participation
- Assemble the team
- Identify talents
- Select a team leader
- Adopt long and short range plans
- Assign tasks (by role, talent, or interest)
- Provide advance notice of meetings
- Conduct meetings at least every four months
- Maintain written minutes

### Roles on Teams

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Diverse skills and views are the key to effective teams. Each individual brings their own unique skills and talents to add value to the process. Who is your best writer? Best interviewer? Best photographer? Savviest with social media? Think about how you can align your talent and resources, and what role they can play on the Advocacy Team. Some ideas for roles include:

- Team Leader – well spoken, diplomatic, consensus builder
- Researcher – investigative, curious
- Coordinator/Planner – reliable
- Editor – eye for detail, uncovers errors, disciplined, efficient
- Specialist – special knowledge
- Shaper – dynamic, creative, imaginative
- Evaluator/Monitor – recognizes accomplishments and lessons learned
- Communicator – excellent writer, speaker

There are many types of roles. Don't just follow our list; go ahead and develop your own!

## Team Mission

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For a team to be successful it needs to have a shared vision of the goals and necessary tasks, and it needs management commitment and support. It also requires commitment from the members of the team. Ultimately, the mission of the team will be to support the *Advocacy Agenda* that is decided upon. However, you may decide to create a specific mission for your team. An example might go something like this:

*The Mission of the Advocacy Team is to unite all members of the organization in promoting policies and regulations that produce or preserve public and affordable housing, that stabilize communities and that deliver sufficient funding for resident programs and services, and to do so in a way that is cooperative and non-adversarial.*

## 'Job Description' for Team

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Participants might be hesitant to volunteer if they don't understand their role. Consider forming a 'job description' for the team to inform team members of their purpose and their role in the planning process. Also, provide practical information such as the time commitment that will be required.

A team left to its own devices may contribute little to the advocacy effort. Ideals and motivation can quickly fade if the specific role of the team in supporting advocacy goals and campaigns is not clearly understood. To avoid confusion among the members of the team, it is helpful to spell out some of their primary responsibilities.

Common responsibilities of team members include:

- Attend all meetings
- Prepare for meetings
- Participate in discussions
- Be prepared to compromise
- Cooperate with team members
- Make the meeting productive
- Be respectful of team members
- Work toward achieving the advocacy goals specified

## Where to Find and Engage Potential Team Members

You will need to get the word out. Organization-wide involvement is crucial to success, so be sure to take the time to communicate the opportunity to participate on the Advocacy Team. Personal appeals are one strategy to encourage participation. Executive directors are more likely to get commitments if they personally request their participation. There are a variety of ways to recruit team members and you may use one, a few, or all of these strategies:

- **Person-to-Person Outreach:** A personal appeal from the leadership, employees, or key volunteers of an organization in the form of written communication or a phone call can be an effective way to recruit advocates. For small efforts use personal phone calls from you or other engaged advocates. Larger efforts may involve e-mail campaigns, phone banking, or direct mail asking recipients to join the effort.
- **Each One Reach One:** Under the ‘each-one-reach-one’ approach, every current advocate is responsible for recruiting one other advocate. With 100% participation this approach can double your team in no time! Appeals from fellow members of the organization to their colleagues are often one of the most effective ways to build a network.
- **Easy Access to Registration Information:** Use your existing outreach channels, such as website, e-mails, newsletters and the like to solicit involvement in the advocacy network. Some options to consider for outreach under this approach include:
  - A registration form on your website
  - Updating your e-mail signature to let people know about the Advocacy Team and how to sign up
  - Information in e-newsletters, brochures, or other out bound information about the advocacy effort and how others can join the cause
- **Recruitment at Events:** Events, such as conferences, community gatherings or the like offer tremendous opportunities to recruit potential advocates.

Once a team is formed, share the news about the team and its role to everyone. A good approach is to keep everyone informed each step of the way:

- When the team is first being organized, let everyone know and ask for suggestions
- When the roles and goals are established, publish a letter
- When the team is about to start operating, publish the names of the members to let everyone know they are participating

Some organizations communicate this information outside the organization—for example, to the families of employees or out to the neighboring community. It provides an opportunity to ask for more volunteers.

## Encourage Participation of Commissioners

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Commissioners may be appointed or elected, and therefore have personal connections to local government, local business, and to the community that are valuable to your advocacy efforts. Consider what specific roles commissioners may have in your advocacy efforts.

Some ways commissioners can support advocacy efforts include:

- Developing a list of other housing champions in the community
- Identifying grasstops
- Sending e-mails to officials, representatives, and local leaders

As always, a public official must adhere to any laws, rules, or controls that govern their behavior. This includes all federal and state laws, the Hatch Act, the Annual Contributions Contract (ACC), and attorney general opinions. As a rule of thumb, a public official should be familiar with all local, state, and federal laws they are subject to. Avoid the appearance of impropriety by disclosing any possible ethical issue. Get a legal opinion if there are any questions about any issue, and review the HUD *Ethics Manual* which is available at <http://www.hud.gov/local/in/working/ph/guidance1.pdf> regarding potential conflicts of interest.

## Encourage Participation of Residents

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To facilitate collaboration, encourage resident participation from the inception of the advocacy planning process. As promoted in HUD's Management Handbook 4381.5 (12/94), *"The participation and cooperation of residents is important in creating a suitable living environment and can contribute to the successful operation of these properties."* One key area resident groups can influence is organizing social and educational programs for children and adults in the community.

As a group, residents have the opportunity to inform national housing policy through a number of channels, including the National Association of HUD Tenants. An example of this group's successful resident advocacy campaign, 'Save Our Homes Campaign' (2011), is available at: [http://www.saveourhomes.org/naht\\_files/save\\_our\\_homes\\_story.pdf](http://www.saveourhomes.org/naht_files/save_our_homes_story.pdf).

### **Resident participation on the Advocacy Team is also an opportunity for empowerment.**

Residents have an opportunity to gain the skills and confidence to improve their financial situation through the education, personal growth, and leadership opportunities that participation offers. New skills acquired can increase self-reliance and lead to opportunities for better jobs.

Adding the resident voice to the conversation has many benefits:

- Resident organizations and tenants can provide additional community links – such as church groups, PTAs, civic associations, and other community based organizations.
- Residents know the property better than any outsider, and can assist as allies in identifying program impacts and in gathering success stories.
- Residents ‘look out for each other.’ Resident-driven activities contribute to the social well-being of the property. Social activities may include activities for children and youth, visits to the elderly, informal translating services provided by bilingual neighbors, or neighbor-to-neighbor tutoring on computer and job-search skills.

Residents elected as Commissioners, or who serve on the Resident Council or Advisory Board (RAB) can be excellent partners in developing an *Advocacy Plan*. Residents and Section 8 participants have a personal stake in the long-term success of the property. Involving them in the process provides benefit to both parties. The residents are provided an opportunity to add their voice to the cause and become involved in the planning process, and the organization gains essential information about which programs the residents themselves have identified as beneficial, along with their personal stories about program impacts.

## Identify Available Resources

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Your ability to develop and implement an advocacy *Campaign Action Plan* will be affected by your available resources – mainly money and time. The good news is that many organizations are able to conduct a very successful advocacy effort utilizing a limited amount of resources.

### Monetary Resources – Plan Your Budget

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All housing agencies are faced with monetary limitations. There are costs involved with many types of efforts – such as deciding to travel to attend legislative or advocacy-related events. If you are considering developing a large scale campaign (such as a public awareness campaign, community-wide effort to impact a funding issue, or a referendum) you will need to consider larger budgetary issues and develop a budget for such activities.



**Advocate Toolbox**  
[Budget Worksheet](#)

Budget item may include:

- **Personnel**, including percentage of salaries for the executive director, government relations employees, and others with responsibilities for the advocacy network
- **Outside Consultants**, including those with experience in advocacy network development, website and outreach consultants, trainers and others as appropriate
- **Online Tools**, including a website/action alert center, list management service, and other resources
- **Overhead**, including telephone, faxing, postage, and computer costs
- **Materials**, including online and off-line advocacy toolkits, brochures, and workbooks
- **Events**, including all expenses associated with legislative days, policy committee meetings, and district meetings
- **Outreach Costs**, including internal outreach to members of the advocate network as well as public relations and media costs

## Time – Plan Your Advocacy Calendar

It is important to consider the amount of time you have available to devote toward your advocacy efforts. This will impact which actions you personally decide to take as well as those you might build into your larger *Campaign Action Plan*. Developing an *Advocacy Calendar* is discussed in more detail in another section. If you are constrained by the amount of time available, you may want to begin by building an individual *Advocacy Plan* based on the amount of time you have available.

Here are some ideas for launching small-scale campaigns to get you started:

- If you have 15 minutes per week
  - Engage policymakers through social media weekly
  - Prepare for and undertake a phone call once a month
  - Write a personalized communication every two months
- If you have one hour per week
  - Arrange for a district office meeting
  - Attend a town hall meeting
  - Brief Board Members and key volunteers on advocacy activities
- If you have two to three hours per week
  - Arrange for a site visit / facility tour
  - Arrange a town hall meeting
  - Develop an advocacy network to get others engaged

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## Build Coalitions

People often want to make coalition building a complex process, but it's really about taking a look around and finding potentially like-minded groups or organizations that might have an interest in supporting public housing. Methods for identifying potential coalition partners include:

- Thinking through who benefits from your programs (kids, parents, teachers)
- Looking in the local yellow pages
- Trying a Google search
- Networking with leading organizations in the community, such as the chamber of commerce
- Asking your colleagues, employees, and friends
- Brainstorming with your volunteers and others



### Toolbox Resources

- [Coalition Partners Worksheet](#)

Consider forming unusual partnerships. Standing shoulder to shoulder with an unlikely organization in support of a cause gets attention!

Coalitions have a number of uses, including:

- They often help you have wider access to local leaders; because you have more people involved representing more communities
- They increase your ability to frame the message and have it heard
- Coalition members with a different area of expertise can deliver those messages with increased credibility (i.e., the economic or environmental benefits of an issue)
- They can help in spreading the effort of the campaign. If utilized properly, many hands can get the job done faster

Recognize allies and bring them on board with care. Coalitions bring value to an advocacy campaign for a variety of reasons. They provide more depth and breadth of policy expertise and regional coverage, they offer more 'hooks' and opportunities for media coverage and, as the adage goes, there's 'strength in numbers.' One of the most important reasons to form coalitions is to be sure you can reach the right audiences with the right messages. Through coalitions, individual grassroots or grassroots networks can reach out to a wider range of policymakers. In addition, coalitions give your housing agency the ability to deliver different aspects of the message based on the interests of the intended audience. Seek to enlist coalition members that reside in the district of legislators you plan to visit. Enlist groups that are well organized, and that can bring both credibility and their solid reputation to the cause.

Coordinate your message with national, state, and local organizations and agencies that support your cause to make your advocacy campaign more successful and effective.

For examples of successful coordination:

- Learn about the success [Connecticut Housing Finance Authorities](#) had coordinating its *Advocacy Plan* with the state in the 'Advocacy in Action' section
- Learn about an award-winning example of coalition building by the [Michigan Housing Development Authority](#) in the 'Advocacy in Action' section

Once you have recruited an organization and it has endorsed your campaign, it's important to get them involved. While it is not suggested that you try to tackle all of these projects, some ideas for action items that coalition members may carry out include the following:

- Send mail and e-mail communications to its members endorsing the campaign
- Provide regular updates on campaign happenings
- Ask its members to volunteer for the campaign
- Use its name on the campaign's letterhead and in advertising
- Allow its leadership to speak to members of similar organizations and garner their support
- Initiate a 'letters to the editor' campaign
- Mobilize its forces to vote on Election Day

When selecting potential partners consider:

- What is at stake for them
- The resources they bring to the table
- The insights they can offer
- The power or influence they might have
- Their credibility and reputation

Set the direction and establish ground rules for how your organizations will work together for the cause.

Your action steps will be designed to work for specific audiences in different venues. These action steps are like a tactical plan to help you move your plan forward.

Before setting action steps for a policy-oriented campaign, you must understand where policy decisions are made. Legislative and regulatory bodies at the national, state and local levels can impact the day-to-day work of Agencies.

## Research Your Venue

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Consider your agenda items and which venue is appropriate:

- Public laws and ordinances (at city/county, state/province/tribal, or national levels)
- Regulatory policies (at city/county, state/province/tribal, or national levels)
- Executive orders from elected officials
- Business policies and organizational rules and bylaws

Here's a brief overview of a few types of issues handled in each of the venues:

**Federal Government:** Decisions made by Congress and federal agencies relate to overall funding and program implementation for all public housing programs, including:

- Funding for operating and capital costs
- Section 8 rental assistance
- Community Development Block Grant (CDBG) and economic development programs
- Small housing agency reform legislation
- The low-income housing tax credit
- The HOME program
- Homeless assistance grant programs

**State Government:** Decisions made by state agencies relate to issues such as:

- Tax-exempt housing bonds or Mortgage Revenue Bonds (MRBs)
- Allocation of the Low Income Housing Tax Credit
- Allocation and administration of the HOME Investment Partnerships block grant
- Many Housing Finance Agencies (HFAs) also have responsibility for administering federal housing programs, such as Section 8 and homeless assistance

An HFA or a state department of housing may provide additional funding for public housing programs. This varies from state to state. Check your state's webpage for more information. A list of state HFAs is available on the National Council of State Housing Agencies website at <http://www.ncsha.org/housing-help>.

**Local Government** includes mayors, city councils, and local agencies. While it varies widely from locality to locality, local legislators and agencies also make decisions related to investments in public housing. These entities may also make decisions about which federal and state grants to pursue.

## Research Your Audience

You can research information about your issue in many places including the Internet, media archives, city hall records, Annual Reports, surveys, local business experts, or the chamber of commerce. However, it is impossible to develop an effective, targeted message without first understanding your audience. Begin campaign planning by researching who you intend to deliver your message to.



1. Who are they?
2. What do they know and expect?
3. How do they feel about this cause?
4. What would they define as interesting or important?
5. What will persuade them?

Some of the factors that influence decision makers include:

- **Personal and Political Relationships:** Friends, family, staff, and party leaders have a tremendous influence on the day-to-day decisions of elected officials.
- **The Message:** What you say to elected officials is actually important. In our case, we are arguing in favor of policies to benefit and protect the 2.2 million US citizens in public housing – as well as those who may spend years on waiting lists.
- **The Media:** Media coverage of events will often have an influence on what elected officials talk about in hearings and introduce as legislation.
- **Personal Interests and Passions:** Every elected official has an issue or two they care deeply about. Effective advocates will figure out what those interests are and then frame their messages in those terms. This is why the research you conduct will be critical to your success. What's most important? Knowing what the official cares about allows the advocate, in many cases, to frame the message in terms that the official will find compelling. For example, an official who cares deeply about health care issues will likely be more persuaded by any health related arguments that can be made about having adequate access to housing.

Research the issues the policymaker cares about, even if unrelated to your concern. This might include reviewing websites or looking up bills the policymakers have introduced.

This can help you frame your message in compelling ways. It can also be useful to know the general political persuasion of the policymaker, such as identifying their political party to gain insight into how the official might react to the policy proposal.

Questions to consider when researching the **regulatory agency** audience:

- Which agency handles the issue?
- Who within that agency is responsible for implementing that area?
- Who determines that agency's budget?
- What is the mission of the agency?
- What are their priorities? What limitations do they face in addressing your concern?

Questions to consider when researching the **policymaker** audience:

- Who are my representatives and senators?
- What are their legislative records and general philosophies? What groups have they generally supported in the past?
- What issues are they passionate about?
- What committees are my representatives or senators on?
- Is my representative or senator newly elected, or more senior?
- What party does my representative or senator belong to?

## Who's Who in Washington, DC

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It is important to identify the key players in the legislative process, as they will have the most influence on your legislative initiatives. The following is a brief introduction of the key players.

**Legislators:** In general, you'll want to approach specific housing-related legislative committees.

- Chamber leaders – these are the individuals who will set the overall agenda
- Committee leaders – these are the individuals with the most say over your agenda
- Rank and File – these individuals may eventually vote on your issues

**Regulators:** In general, you'll want to approach housing related agencies, such as HUD or your state agency. Key players include:

- Governor's office – staff in the governor's office are generally setting funding and budget priorities for your issue
- Agency leadership – they set the agenda and timeframe to your issues
- Agency staff – they undertake the day-to-day work on your issues

**Congressional Staff:** Most state legislatures and the US Congress, along with their related executive branch agencies, utilize staff people to assist policymakers. Advocates should understand that staff people are critical to the process of effective policymaking. In too many cases, advocates are disappointed to meet or work with ‘just the staff.’ Instead, staff should be viewed as critical components of the policymaking process. In fact, a good relationship with a staff person will often make the difference in a legislative or agency environment. Considerations when dealing with Congressional staff include:

- **Who is the appropriate staff person?** When the official has more than one staffer, advocates should identify the appropriate employee for the particular issue. In most cases, this can be done by simply calling the office and asking.
- **What does the employee need?** Congressional staff people handle a bewildering array of issues. They simply cannot know about everything related to any of their issue areas. They rely on local experts to help them understand the issues and potential impacts on the people they represent. They don't necessarily need to know everything the experts know about an issue. They simply need to know who to talk to should questions arise. Advocates should realize that the purpose of any meeting with an employee is not to impart all of their wisdom; rather, it's to leave a positive impression of helpfulness and knowledge with the staff person.

The following is a list of the staff people you might work with:

- **Staff Assistant:** Most House offices have one staff assistant. Most Senate offices have at least two. They handle front desk duties, such as answering phones, greeting visitors, sorting mail, and coordinating tours. May handle a few policy issues as well.
- **DC Scheduler/Executive Assistant:** Schedules the congressman's time. In many offices, they may also handle an issue or two.
- **Legislative Assistant (LA):** Handles the bulk of the policy work in a congressional office. A House office usually will have two to four LAs and a Senate office will have from three to as many as 12 (depending upon the state's population).
- **Legislative Director (LD):** Handles policy issues and oversees the legislative staff. There is usually just one legislative director in each congressional office.
- **Legislative Correspondent (LC):** Draft letters in response to constituents' comments and questions, and may also handle a few legislative issues. Most House offices have one or two LC's. Senators have three to five, depending on their state's population.

- **Press Secretary/Spokesperson/Communications Director:** Responsible for fielding all calls from the media and is often the spokesperson for the office. House offices usually have one designated press person. Senate offices have two to five.
- **Chief of Staff (CoS)/Administrative Assistant (AA):** Oversees the entire operation. Sometimes handle a few policy issues, but generally manages office.
- **District Staff:** Each congressional office has an office (or several offices) in the district or state. These offices have a variety of staff people in similar roles, including the district director, scheduler, and press secretary. District offices also have field operatives and caseworkers responsible for connecting with the community. You can bring great value to each of these staff members, especially the caseworkers in the federal legislative offices. Individuals in legislative offices receive hundreds of calls from constituents regarding every issue under the sun – from social security benefits to health care coverage to, yes, public housing. They are always looking for someone who can help address these issues. Your expertise can provide valuable insights and connections as you both work to serve the same residents.

## Gauge Your Support

To better understand your audience, you'll need to be able to categorize their level of support. After your research, select the category below you feel best reflects their level of support for your issues based upon your research or on past position on issues.

| Audience  | Your Goal  |
|-----------|--|
| Champions | Thank them for their help and acting as a resource   |
| Supporter | Encourage them to further reflect their support through action   |
| Neutral   | Focus attention on the neutrals. These are individuals who will eventually vote on your issues. They may not be as knowledgeable as you need them to be in order to make smart decisions                 |
| Opponents | While you don't want opponents to have free reign with their arguments, try not to focus too much of your time on them. That said, don't ignore them – sometimes you can turn an opponent into a friend! |

While it is good to know your detractors from your supporters, you may not always be able to determine the level of support your target audience has on your issue.



## Tools To Find Your Representatives

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There are a wide range of tools available to find your representatives and to stay informed on national and local legislative issues.

### Official Congressional Website

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You will find information about your congressperson at their official government websites at [www.house.gov](http://www.house.gov) and [www.senate.gov](http://www.senate.gov).

### Capwiz

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Capwiz is a powerful online advocacy tool made available by housing associations to their members free of charge. It is typically located under the *Legislative Action Center* of their respective websites.

- **HAI Group:** <http://capwiz.com/housingcenter/home/>
- **PHADA:** <http://capwiz.com/phada/home/>
- **NAHRO:** <http://www.nahro.org/nahro-advocacy>

Using your zip code, you can easily research and find the information you need to get your advocacy efforts underway. Some of the information Capwiz makes available includes:

**Elected Officials:** Includes voting patterns on bills of interest, maps with contact information, search capabilities, and a zip code list featuring a ‘key votes’ spotlight.

**Issues and Legislation:** Offers alerts and updates from your housing association, current legislation (and status), the ‘calendar of the day’ for schedules and hearings for US House of Representatives and US Senate initiatives, and a Capitol Hill basics – useful information on legislative employees, the legislative process, communicating with members of Congress, and visiting Capitol Hill.

**Elections and Candidates:** Provides locations of elections by state, candidate or zip code – from the presidential election down to state level elections.

**Media Guide:** Not only can you find information for your officials and legislators; you can also find media contacts for press releases. A state-by-state list of newspapers and journals with links to their contact information is available.

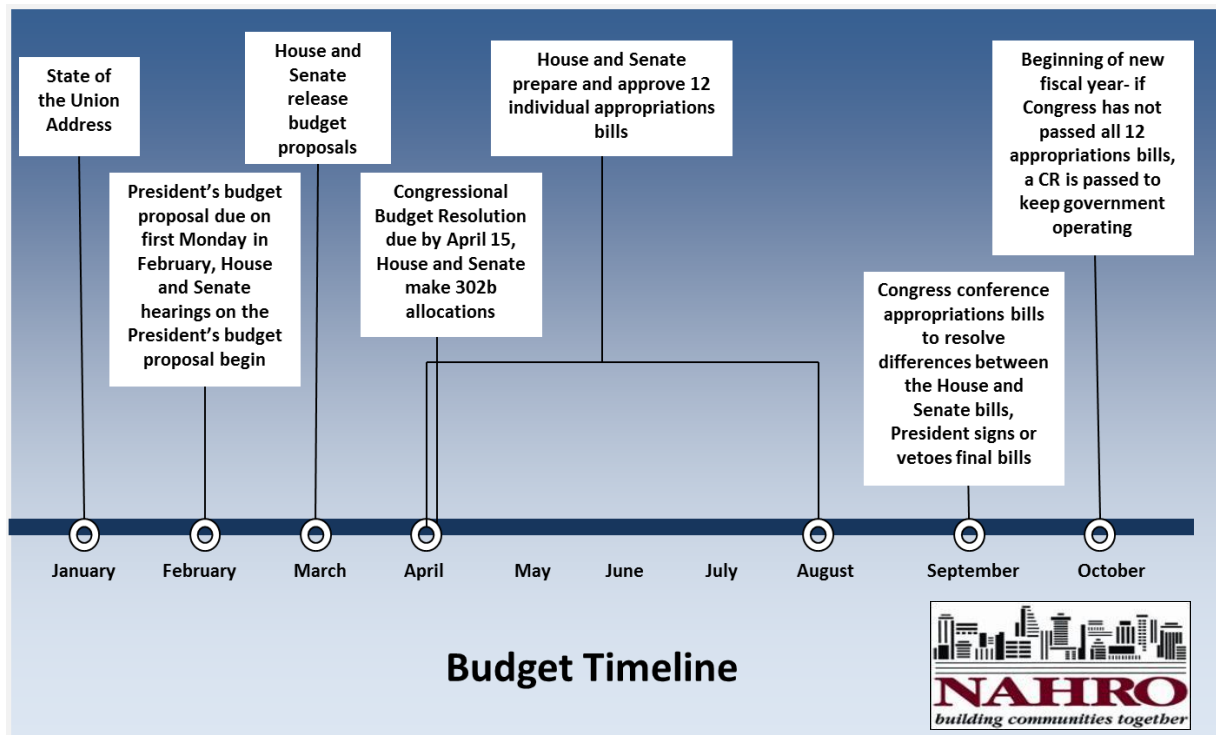
## Schedule Your Activities – The Advocacy Calendar

An *Advocacy Calendar* contains the schedule of when you will take your campaign action steps. When is Congress in session? When are legislative conferences occurring? Your calendar creates a timeline for the activities you will complete.



Scheduling activities helps make sure you stay on track, and puts time into your calendar to devote to advocacy.

A sample federal budget timeline calendar format is provided below:



Plan advocacy activities throughout the year and overlay the months with the advocacy message you want to hit at that particular time. Some ideas for planning your own advocacy calendar activities each month are provided below:



**December:** Legislator Research

Action item \_\_\_\_\_

Use what is traditionally 'downtime' to learn more about the legislators you'll be approaching – and ask your advocates to do so as well! Be sure to know their policy interests, percentage of win, their policy platform at [www.congress.gov](http://www.congress.gov), and their vote ranking from various interest groups more info at [www.votesmart.org](http://www.votesmart.org).

**January: Local Connections**

Action item \_\_\_\_\_

Coalitions can make or break your cause. Who might serve as good coalition partners, either because they support our cause *or* because they have good relationships with our target audience? Who should approach them? Think about coalition partners that make sense. For example, if you're trying to reach a legislator interested in economic development see how to get local businesses on board.

**February: Follow-the-Money**

Action item \_\_\_\_\_

February usually marks the start (or continuation) of the budget process, although it is often delayed. This is a good time to be sure you know what's going on. At the Federal level, NAHRO, PHADA, and CLPHA are great resources. You may also want to consider the National Priorities Project at [www.nationalpriorities.org](http://www.nationalpriorities.org). This site has useful calculators that will show supporters how their tax dollars are being used for housing programs.

**March: Social Media Outreach**

Action item \_\_\_\_\_

Social media can be an incredibly useful tool for effective advocacy. 'Like' your legislators on Facebook (you don't have to actually 'like' them). Find mutual connections on LinkedIn. Follow them on Twitter. This gives you new insights into their interests and actions.

**April: Hone Your Message with the Message Formula**

Action item \_\_\_\_\_

To be agreed with, you need a message that resonates with the audience.

- Hello, my name is [ ] and I'm from [ ] (establishes relevancy)
- I am here to talk to you about [policy / relationship 'ask']
- Knowing of your interest in [what policy issues is the person you're talking to interested in?] we think you'll be interested as well
- This is important to the people I represent because [personal story]
- That's why we really hope you'll ['ask']
- I'd like to follow-up by [follow-up ideas]
- Can I get contact information for all the appropriate people in your office?

**May: Get to Know the Legislator's Staff**

Action item \_\_\_\_\_

Getting to know staff can move your issue forward even faster than getting to know the policymaker.

**June/July:** Create Media Messaging or Ask for a Statement in the Congressional Record  
Action item \_\_\_\_\_

Choose the media outlet you will approach. Find your 'hook' both in terms of hot topics and reporters' needs and you'll be on your way to free publicity in no time. Getting a legislator 'on the record' can be very valuable for any advocacy effort. Ask your elected official (through the staff person you've already developed that great relationship with) to submit a statement to the Congressional Record about something happening in the community. Learn more at [www.congress.gov](http://www.congress.gov).

**July/ August:** Site Visits and Town Halls

Action item \_\_\_\_\_

August is a prime time for visits. Showing a legislator or staff person something 'on the ground' helps them understand how what you're asking for connects to the real live people they represent. It's always better to show people things, not just tell them. Legislators often set up meetings in their districts to hear the views of their constituents, especially during an election year. Find out when meetings will take place and plan to attend. If you stop by a little before or after you may be able to talk to the policymaker directly.

## Develop Effective Messages

Your message is intended to persuade your audience to do something different. To convince them, you need to get them involved and engaged. Developing messages that offer insight into how your housing agency impacts the local community and the broader district can be highly effective.

You can create an objective for your message by starting with the phrase: ***"As a result of this communication, my audience will ..."*** Complete this statement to identify what you want your audience to do, to know, or think as a result of having read or heard your message. A strong message contains a statement, and three or four points to bolster and support it. The points you make provide reason to believe your statement is true. Use a combination of facts as well as personal stories to make your case about what you do and why it is important.

Simplify the information. Focus on the ideas that are essential and needed to grasp the main point. Use familiar examples to explain difficult concepts.



### Toolbox Resources

- [Preparing a Message Worksheet](#)
- [Creative Message Development Worksheet](#)

Keep it as short as possible; long documents are intimidating. Avoid the use of jargon or acronyms to make your message easier to understand by someone not familiar with your programs.

Aim your message toward your key decision-maker. Research and understand their current position on your issue in order to determine how to convince them. What is their probable bias - positive or negative? What is their probable attitude toward your ideas or recommendations? Are they likely to favor them, be indifferent, or be opposed? What do they have to gain or lose from your ideas? Why might they say 'no'?

If they are positive or neutral, develop a message that reinforces their existing attitude and use your key points to reinforce the benefits with facts and personal stories. If they are negative, try one or more of these techniques:

- Convince them that there is a problem and show how this can solve the problem.
- State points with which you think they will agree first; if audience members are convinced on one or two key benefits, they will tend to accept the others as well.
- Respond to anticipated objections. You will be more persuasive if you consider possible objections in advance and prepare alternative messages that help to reject objections.
- At first, limit your request (your 'ask') to the smallest one possible (such as requesting a visit to your property rather than creating a new pilot program). You are more likely to get your request, and later you will be more likely to get a larger request. Make it easy for the audience to respond with the specific next steps or specific action you desire.

Once you develop a strong message, it will become the core of your advocacy campaign. You will repeat the message throughout the campaign, but may change the key points that support your message based upon the audience you are trying to reach.

## Crafting Personal Messages

Go beyond sending a form letter. It is powerful to have someone speak or share a personal story of how they benefit from the quality of your program, or how they suffered from the lack of a program. Any citizen, regardless of their position or influence level can develop messages that are personalized, and thoughtful. And they SHOULD because, well, it works! Knowing about your audience helps you create messages that your audience can relate to – and the best place to start is with a personal story.



### Toolbox Resources

- [Questions to Research](#)
- [Personal Stories](#)
- [Storyteller Information Form](#)

## The SPIT Technique

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One method to help you create short, compelling statements that are useful when communicating in very brief interactions is the **SPIT Technique**. It is a great way to boil everything down into a short ‘elevator’ speech. SPIT is an acronym to help you remember the key elements needed to design a good message. These elements include:

- **Specific:** Be as specific about what the leader can do. “We would like you to write a supportive letter” is better than “our housing agency provides valuable services.”
- **Personal:** Messages that are based on compelling stories have more of an impact. Think about specific people you have served. How did you help them further their education? Gain employment? Improve their health? Focus on the benefits you provide instead of just the fact that you might need funding.
- **Informative:** Have valuable information to back up your personal story. Some of the information you might want to provide includes: number of people served, number of people employed, or specifics on programs provided.
- **Trustworthy:** Be clear that you’ll follow-up and are in this discussion for the long haul, and that you’d like to help them learn more about your issue and concerns.

## The Message Formula

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Using the **Message Formula** helps you weave key elements into a winning message.

- ☐ Knowing of your interest in [fill in the blank with something that you know about the policymaker, such as policy issues or legislation they are passionate about]. *Through this step you are demonstrating **relevance** to the issues the policymaker cares about.*
- ☐ We would like to talk to you about our ideas on [fill in with a **specific** description of your policy issues]. *Outline the specific issue you want to discuss, along with the specific ‘ask’, where applicable.*
- ☐ We represent [fill in with a number or other quantifiable description] of your constituents. *Demonstrate your relevance to those the policymaker represents.*
- ☐ We would like to provide the following benefits to them [fill in with the positive outcomes of your proposed policy]. *Demonstrate your positive approach.*
- ☐ To do so, we are seeking [fill in your ‘ask’]. *Demonstrate the specific action an official can take to help you achieve your goal.*
- ☐ We believe this is important because [fill in with your personal story]. *Make the policy issue real for the official.*
- ☐ Closing statement: We hope that you will be a partner with us in providing [list benefits] to the residents of [list community/constituent area] by [specific target]. *Summarize the message.*

The message you deliver contributes something of value to your elected official because you are a constituent and you represent the concerns of constituents. Storytelling is a critical component for engaging and educating the public, media, and decision makers. Your job is not to spew forth as many facts and figures as you can find about your issue. Instead, your job is to MAKE IT REAL for the general public and for the elected official and their staff by sharing your personal story.

**Sample Letter Using the Message Formula.** Imagine you are contacting a legislator in support of legislation promoting family self-sufficiency programs. You know from your research they are interested in education issues. Here's how you might use this formula to create a customized message:



*Dear Senator Johnson,*

*Knowing of your interest in education we would like to talk to you about our ideas to improve access for low income students to education. We believe one important way to achieve this goal is by maintaining the public housing program funding. Many children we serve have difficulty staying in school. Like you, we believe education has a critical role to play in breaking the cycle of poverty. We hope to allow our residents to provide their children with the education they need to compete for twenty-first century jobs.*

*I live in your district and represent thousands of other constituents in Wisconsin who benefit from public housing services. Let me tell you more about the work being done at Milwaukee Housing Authority (Wisconsin). Our Central City Cyberschool at Lapham Park serves 400 students in grades K4 to 8 and won the Innovations in American Government Award from the Ford Foundation and Harvard University's JFK School of Government. Since 2005, the housing agency's Education Initiative has sought to improve school attendance and educational achievement, ensuring that children attend school every day and linking them to community learning centers and tutoring programs that help reduce barriers to their success in school.*

*Our mayor, Tom Barrett, has great things to say about the value our housing agency brings to the local community. In fact, he took the time to video a public statement. You can watch it at: <http://youtube/2XzFqUdqc3s>. This is why we'd like to invite you to visit our properties the next time you are in the town. Will you do so?*

*We hope that you will be a partner with us in providing these economic and social benefits to the residents of your district by supporting funding for the continuation of our valuable housing programs. We look forward to your response to our invitation to visit.*

*Sincerely, xxx*



## Storytelling

In 2013, HAI Group launched a national public awareness campaign to dispel myths and encourage Americans to realize the benefits public housing agencies offer to the greater community. The ***ReThink: Why Housing Matters*** campaign relies on robust content and storytelling to positively influence perceptions about public housing.



The ***ReThink*** website ([www.rethinkhousing.org](http://www.rethinkhousing.org)) and its related social sites on Facebook (<https://www.facebook.com/ReThinkHousing>) and Twitter (<https://twitter.com/rethinktweets>) contain personal stories of success from residents of public housing that help support local and national media relations efforts.

*ReThink* offers the following process to find and develop stories to make your content more personal and compelling.

- Identify and compile potential stories. Locally relevant content can be beneficial.
- Agencies have ‘good work’ to share or highlight based on the programs that benefit their resident population and therefore the greater community (e.g., educational support programs, self-sufficiency programs).
- Agencies may have strong relationships with a local decision maker or nonprofit who works closely with the housing agency and can speak on their behalf.
- Many local agencies employ case managers who have the best access to residents, and can quickly identify individuals and families who might have a great success story to share.
- Consider vetting the storyteller and the story and obtain their approval for use. This may include being available to speak with the media, and giving permission to be featured in written and visual form (photos or video) on the websites and social channels.
- Focus on a theme, which could be unexpected, relatable, personal situations leading to public housing as a solution.

These might include:

- A veteran providing for his/ her family and unable to work due to the economy/a disability
- Military family where a spouse or parent died in combat
- Families impacted by economic recession/closing of factories/mines/agricultural consolidation
- Families impacted by natural disasters (Hurricane Sandy, tornadoes, etc.)
- Expand diversity of your stories, looking for content from untapped social groups



## Develop Effective Materials

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When you've finished developing your message, you can deliver it in writing, on the phone or in person. For written versions, in most cases you will need at least a one-page fact sheet about your housing agency that specifically details the benefits you provide.

### Materials and Brochures

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All materials should be created in a visually appealing manner. Take a look at the existing materials created by your communications, public relations, or website team. Some of the materials you need may already be created.

Begin with what you know best – your own agency – by creating a **'One pager'** fact sheet about your work, and why it matters. Highlight your 'good work' based on programs that benefit your resident population and the greater community (e.g., educational programs, self-sufficiency programs). Include your mission and information about the federal or local partnerships that help you provide a range of different services to constituents. Lastly, identify the challenges you face, personal stories and examples of how these challenges manifest in your community, and how the policymaker can help. Use the form provided in the Advocate Toolbox section to design your one-pager.



#### Advocate Toolbox

[Develop a 'One-Pager' Worksheet](#)

You can take the materials one step further by creating a more comprehensive or more localized focus on the needs and interests of specific legislators.

Housing associations provide effective legislative agendas to their respective memberships, and make materials and resources available on their websites that can be used to educate, inform, and further your own advocacy efforts. You may be able to leverage some of the information provided to support your own message. You may also review examples provided in the 'Advocacy in Action' section of this *Guide* to learn about materials other organization have developed.

Please remember to always cite your sources when quoting another organization's materials!

## Use Facts and Data

Find relevant data in support of your cause. A few key facts that support your message may be all you need.

Officials and representatives prefer localized data. They want to understand how the data relates to their own constituency. Keep it localized to the county, district, or locality of your official or representative.



When using data to support your point, remember to tie it to your issue with a relevant personal story that shares more about why it matters. If you want to help make your case, work to uncover the stories behind the data.

Relevant data is available in the *Resident Characteristics Report* <https://pic.hud.gov/pic/RCRPublic/rcrmain.asp>. This summarizes resident demographic data provided by HUD form 50058.

### Resident Characteristics Report

- **Total occupied housing units, or the number of households being served**
- **Average household income of residents, or the average annual income**
- **Diversity of families served** - Distribution by Head of Household's Race or Ethnicity
- **Number of households served that are low income** - Average Distribution of Population Served by Income (Number and percentage of Extremely low, Very Low, Low and Above Low income levels)
- **Sources and types of income received by households served (distribution and sources)** - Details percentage of residents with zero income as well as various other income levels, households with wage or other income, percent on welfare or social security/pension incomes and percent with no income
- **Average monthly total tenant payment (TTP)**
- **Tenant rent paid by family type – distribution** - Reflects percentage paying no rent, versus percentage paying rent at various rent levels
- **Types of families served - distribution by Household** - Breaks down population into percentages served and average amount of rent (TTP) paid by various types of households ( Elderly Disabled No children; Elderly Non-Disabled No children; Elderly Disabled with Children; Elderly Non-Disabled with children; Non Elderly Non-Disabled No children; Non Elderly Disabled with children; Non Elderly as well as breakdown of percentage specifically for Non-Disabled households with children and Female head of household with children)

Making data local and then personalizing it with real life examples helps to change the hearts and minds of your audience. Learn how the [Ohio Housing Finance Agency](#) successfully localized its own housing data on in the 'Advocacy in Action' section.

## Name Your Campaign

Giving your campaign a name can help people remember it. For example, HAI Group refers to its efforts to dispel myths and improve perceptions about public housing as the *ReThink* campaign. NAHRO and PHADA collectively refer to efforts to reduce regulatory reform for small Agencies as the *SHARP* campaign (an acronym for Small Housing Agency Reform Proposal).

The name of a campaign can frame perspectives on the issue. As you choose facts that highlight your issue, potential names may begin to emerge. You can name a campaign anything you like, but if it is wordy and long it won't catch on. Think strategically about the name of your campaign and what it will mean, at a glance, to people who are hearing it for the first time. The name of your campaign is its calling card. Oftentimes legislators or other policymakers will refer to the name of your campaign as a sort of shorthand, so it's good to invent something that is concise and memorable.

## Select Message Delivery Methods

As you build materials, consider how you plan to deliver your message to your target audience both personally as well as in conjunction with your Advocacy Team and Coalitions. Consider which approaches might work best for you and your situation. An overview of common message delivery options is provided below:

| Categories                | Delivery Options                  |                      |                         | Materials to Prepare           |                     |                             |
|---------------------------|-----------------------------------|----------------------|-------------------------|--------------------------------|---------------------|-----------------------------|
| Online Media              | RSS feed                          | Web                  | Podcast                 | Images                         | Web Article         | Video                       |
|                           | Mobile                            | Social Media         | Listserver              | White Paper                    | Q&A                 | Blog content                |
|                           | Blog                              | Video/Audio          | Mentions                | FAQ                            | Audio script        | Testimonials                |
| Print Media               | Publications                      | Magazine             | Materials               | Poster                         | Articles            | Advertisement               |
|                           | Annual Report                     | Newspaper            | Newsletter              | Fact Sheet                     | Brochure            | Signage                     |
| Direct Mail               | Announcement                      | Letter               | Postcard                | Announcement                   | Bill Stuffer        | Milestones                  |
| E-mail                    | Advertisement                     | Poll/ Survey         | Signature or banner     | Agenda                         | Petition            | Notice                      |
| Phone                     | Teleconference                    | Hotline              | Phone call              | Survey                         | Research            | Phone script                |
| Presentation or in-person | Campaign                          | One-on-one meeting   | Ceremony                | Biography                      | Presentation        | Speech                      |
|                           | District Meeting                  | DC meeting           | Hill Day                | Grand Opening                  | Contest             | Invitation                  |
| Publicity or Media Event  | Information Fair                  | Seminar              | Contest                 | Media advisory                 | Media Pitch         | Commercial                  |
|                           | Briefing                          | Tradeshow Conference | Educational Campaign    | Opinion Editorial              | Letters to Editor   | Public Service Announcement |
|                           | Media Briefing or News conference | Launch event         | TV, Radio call-in shows | Congressional Record Statement | Press /News Release | Briefing paper or script    |

## Pros and Cons of Delivery Options

This chart summarizes pros and cons for each type of activity, and best situations for use.

| Activity                                      | Best for...  | Pros   | Cons  |
|---|--|--|---|
| <b>DC Based Meetings</b>                      | Organizations with a specific legislative 'ask'<br><br>Organizations with a core of advocates willing to travel and attend meetings  | One-on-one meetings are considered one of the most effective ways to engage legislators  | Travel costs for advocates  |
| <b>District Legislative Day</b>               | Organizations with a specific legislative 'ask'<br><br>Organizations willing to take the time to set up meetings with policymakers<br><br>Relationship building efforts to connect policy issues to local outcomes | No travel costs for advocates<br><br>District meetings help make connections between federal or state policy issues and local concerns                   | Can be difficult to achieve a high-level of involvement<br><br>Can be difficult to get feedback on meetings |
| <b>Site Visits</b>                            | Organizations that have members with facilities, projects, or programs that a legislator or staff person can visit   | No travel costs for advocates<br><br>Site visits help make connections between federal or state policy issues and local concerns                         | Can be difficult to achieve a high-level of involvement<br><br>Can be difficult to get feedback on meetings |
| <b>Town hall Meetings</b>                     | Organizations seeking to build relationships with policymakers   | No travel costs for advocates.<br><br>Town hall meetings are likely to be lightly attended, giving advocates good opportunities to meet with legislators | Can be difficult to coordinate<br><br>Can be difficult to get feedback                                      |
| <b>Form, Petition, and Postcard Campaigns</b> | Organizations seeking to engage newer or less active advocates<br><br>Should be used only in concert with personalized approaches  | Offers advocates something 'quick and easy' to do - generally easy to administer   | Not very effective in influencing policy  |
| <b>Personalized Written Communications</b>    | Short and long-term specific legislative asks (i.e., votes and co-sponsorships)  | Personalized communications are considered an effective form of communication in influencing policymakers  | Can be difficult to get advocates to personalize their communications                                       |
| <b>Phone Communications</b>                   | Short-term, specific asks (i.e., voting 'yes' or 'no' on legislation)  | Phone calls to policymakers are considered to be more effective than many other forms of communication   | Need to train advocates with phone scripts and resources  |
| <b>Social Media</b>                           | Relationship building and awareness efforts  | Offers opportunities to engage younger, more 'tech-savvy' members  | Can be difficult to track return on investment  |

# E = Engage Your Plan – *Campaign Action Plan*

## LEARNING OBJECTIVES

- Understand the importance of developing and clarifying ‘the ask’
- Learn the basics of effective communication
- Learn to pull it all together to create a campaign action plan



Having a plan in place is half the battle – now it’s time to engage! This section starts with basic points to remember in any outreach activity, beginning with the importance of ‘the ask.’ and the four basics for effective messages. Then, we turn to details on how to implement each outreach idea you’ve identified in your plan – from e-mails to social media to site visits.

## Clarify ‘The Ask’

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The point of your campaign is that you want to engage someone to do something. Each message you deliver should include a specific ‘ask.’ It might be to support a certain bill or funding level or it might be what is known as a relationship building ‘ask.’ These types of ‘asks’ are useful when you don’t have a current policy-related issue, you have an audience that you’ve asked several times but who has not yet made a decision or, you have a decision maker you disagree with. To build long-term relationships begin with small requests, and as you build trust with your audience and convince them of your message, you can begin to ask for larger requests. Some relationship building ‘asks’ might include: visiting a program, making a public statement or speaking at an event. Details on these are discussed in the implementation section.

## Four Basics for Effective Messages

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For effective advocacy communication, you must always:

**Provide Basic Information:** When communicating about a particular issue, always be ready to provide the basic information, such as a bill number and title if you are asking the official to support a specific bill. Never assume they already know.

**Ask for a Response:** Your goal in any communication is to ensure that someone actually thinks about what you have to say. Always asking for a response demonstrates you care enough about the issue to want to know more.

**Manage Questions:** That said, in any communication, you may find yourself confronted with a question you don't know the answer to. The best response is a simple 'I don't know, but I'll get back to you,' – and then get back to them!

**Be Diplomatic:** It is also important to be diplomatic in order to gain agreement on issues. Below are some tips to remember when engaging in a conversation with someone who may not be in complete agreement with what you believe.

- Give them the benefit of the doubt. Try not to immediately judge or assume why they stand in their current position. You don't know their personal experiences.
- Listen. Try to listen at least twice as much as you talk so you can genuinely learn where they are coming from.
- Avoid blame or confrontation. When you disagree, it is better to begin sentences with 'I', instead of 'You'. It feels less confrontation to hear someone say, "I feel..." rather than statements like "You did..."
- Try not to say 'but.' It means you didn't acknowledge the other person's feelings or point of view. Instead, try saying "I appreciate your point of view on this" or "I hear what you are saying." Give it a minute, and then proceed on saying something like, "and I feel..."
- Make your point using facts and evidence, not emotion.

## Implementation Strategies

Now that you've developed your *Advocacy Agenda*, built your team, assessed resources, developed messages, and crafted your campaign plan, it's time to implement some of the outreach strategies. These communication channels are the methods or routes used to deliver your message.



There are many options for delivering your message. These include:

- E-mail / written communications
- Phone calls
- Meetings in Washington, DC (for federal policy issues)
- Meeting in the state capitol (for state policy issues)
- Meetings in the district
- Traditional media
- Letters to the editor
- Opinion editorials
- Earned media
- Paid media/advertising
- Social media networks
- Site visits
- Setting up or attending town hall meetings

**Do I need a Plan?** It's important that everyone stay on the same page in terms of messages and specific approaches. It does no good to have residents delivering one message via discussions at town hall meetings while you deliver different messages via e-mail and still others, such as commissioners, develop a third message in personal meetings. That's what the plan is for. Remember, these outreach strategies will be implemented by you, members of your team, and coalition partners.

**Do visits and personalized messages really work?** Yes, as reflected in studies from the Congressional Management Foundation ([www.congressfoundation.org](http://www.congressfoundation.org)). Their research shows that in-person issue visits from constituents are the number one way to influence elected officials. Ranking second are individualized postal letters. The next best way to influence is contact from a person representing many constituents, followed by individualized e-mail and, lastly, visits from a lobbyist. In short, research shows personalized communications from constituents are more effective than visits from lobbyists.

Citizen voices matter in the regulator context as well. Those making decisions at the local or agency level also need to understand the value our housing agencies bring to a community. That's why your voice – and the voices of others you engage as you develop your campaign plan – is so critical to making positive change in the public housing arena.

## E-mail / Written Communications

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Written communications in the form of e-mails or letters can be very powerful, but only if the message is personalized and relevant to the policymaker. While many people believe e-mail is less influential than hard copy letters, the truth is that as long as your message is personalized, thoughtful, and directed to the right person, both are effective. In fact, e-mail is much better for communications sent to Washington, DC, because traditional postal mail must be irradiated before making its way to a Congressional office. The process destroys the mail, making it look fairly ugly and virtually unreadable. An e-mail is a particularly useful medium for connecting with congressional staff, individuals you'll want to build your strongest relationships with.

Personal letters get more attention than form letters. Make your communication persuasive and to the point. Include the specific action you are requesting (for example support of a bill or funding for a specific project), and provide facts and stories that support the reason this should be supported.

In some cases, your communication will not receive a response or you'll receive something very vague. It is always appropriate to write again and ask for more clarification. And don't forget the three keys: provide basic Information, ask for a response, and manage questions.

## Phone Calls

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Phone communication is generally not a good way to introduce a new idea, although if this is your only option you should certainly use it. A phone communication will work particularly well for certain circumstances, such as:

- Short and urgent messages, such as 'vote yes' or 'vote no' on a bill that is being considered in the near future – these can be left with the front desk staff
- Direct communications with staff people with whom you've developed a relationship, such as the housing policy person
- Following up on previous communications with the office (such as e-mails or meetings)
- Setting up meetings, through the scheduler, with staff or following up on meeting requests with members
- Press or media inquiries – this would be done through the press secretary



## Washington, DC-Based Meeting

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If you'd like to meet in the Washington, DC office, pay close attention to the legislative calendars in your state and in Washington, DC. For example, when Congress is in session, members are in Washington. You can find these schedules at [www.house.gov](http://www.house.gov) and [www.senate.gov](http://www.senate.gov).

Meetings can be one of the most effective way to deliver a message, but only if you're prepared. First, be sure you've researched your audience and developed your messages. Then, perhaps most important, decide in advance what you hope to achieve and who you need to meet with to achieve your goal. Follow these steps to make your goal a reality:

**Make an Appointment** - You should begin the scheduling process about four weeks out. Start by visiting the legislator's site (remember, this must be the legislator who represents where you live, work, or serve people). This will tell you how they prefer to receive scheduling requests, usually by e-mail or through a web form. Follow up with a phone call to be sure it was received and to answer any questions. Be prepared to resend your request. You may need to follow up several times to get something scheduled.

**Be Prompt and Patient** - When it is time to meet with the legislator, be punctual, patient, and flexible. It's not uncommon for a meeting to be interrupted, delayed, or canceled. If the policymaker is unable to have a full discussion, continue your meeting with the staff.

**Be Direct and Personal** - Be clear on what you are requesting and ask directly for his or her support. Don't just recite the issue paper or fact sheet. It is better to describe the *personal* impact of policy issues on you, your business, community, fellow coalition members, and the state or region.

**The Five-Minute Rule** - You must prepare to deliver your message powerfully and effectively in no more than five minutes. With the possible interference of votes, schedules running late and last-minute emergencies, five minutes may be all the time you'll have.

**Summarize the Meeting** - If any commitments are made, summarize them at the end of the meeting to ensure that everyone understands what has been decided. Keep future developments in mind by offering to provide additional information. Before the meeting ends, confirm who on the official's staff will be handling these issues.

**What to Leave Behind** - Be sure you've developed a short one-pager and be prepared to leave these materials with the official and his or her staff. You should never bring documents you are not prepared to leave behind.

## District Meeting

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You do not need to fly to Washington, DC to meet with your legislator. The same process for setting up a meeting in Washington, DC applies to setting up a meeting at home. During recess, when Congress is not session, members are home. You can find these schedules at [www.house.gov](http://www.house.gov) and [www.senate.gov](http://www.senate.gov). There is one thing that does not increase when scheduling your visit in the District office at home – your travel budget!

## Site Visits

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Why not bring your legislator to you? Members of the US House and Senate spend a considerable amount of time ‘at home’ during what’s known as ‘district work periods’ or ‘recess.’ Access schedules at [www.house.gov](http://www.house.gov) and [www.senate.gov](http://www.senate.gov). Use this time to schedule a ‘site visit’ to a housing program or project site in their district or state. If it’s difficult to get on the legislator’s schedule, ask if their staff will come for a visit. In fact, it can be very effective to have a district or DC Congressional staff person make a visit before you ask their boss.



### Advocate Toolbox

- [Planning a Site Visit Worksheet](#)
- [Setting up a Site Visit Worksheet](#)

## Conduct a Town Hall Meeting

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Another way to meet with your legislator without flying to Washington, DC is to attend a town hall meeting. When members of Congress are back in their districts during district work periods, many hold town hall or community meetings to hear from their constituents. This generally occurs during district work periods, around holidays and through much of August. Attending a town hall meeting is one of the most effective ways to gain the attention of elected officials and their staff. Members of Congress arrange these meetings to hear the people in their districts and states. Take the opportunity to talk to them for a short time about issues that matter to you. View their websites at [www.congress.gov](http://www.congress.gov) or call their offices to find out about these meetings in your area.

**What happens during a town hall meeting?** Formats vary from state to state and member to member. Usually, the member of Congress makes opening remarks and introduces his or her staff. There may be local leaders in attendance as well who wish to make remarks. Then, the floor is opened up to comments from the audience – that’s where you come in!

**Come a few minutes early or stay a few minutes late.** By coming before the start of the event or staying after it is over, you will likely have a few minutes to shake the legislator’s hand as well as meet key staff people from the district.

## Submit a Congressional Record Statement

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Members of Congress have the ability to submit statements about pretty much anything under the sun in the Extension of Remarks section of the *Congressional Record*. You can see samples at [www.congress.gov](http://www.congress.gov). As you'll see, many of these statements are about people, places, or events in various congressional districts. It's best to have something drafted before you ask the office if they'd be willing to submit.

A good outline for creating a *Congressional Record* statement is provided below.

**Opening paragraph:** *"I would like to take this opportunity to congratulate [blank] on [blank]". For example, "I would like to take this opportunity to congratulate [housing agency] on its 50 year anniversary" or "I would like to take this opportunity to congratulate organization [blank] on a successful fundraising effort."*



**Second paragraph:** Provide details on the company/organization/person situation being discussed. Be sure to include how it relates to the congressperson's district.

**Third paragraph:** If there was anything the Congressperson did to help make the event possible, be sure to mention that. For example, "I was proud to write a letter in support of the grant that made this program possible."

**Fourth paragraph/closing:** Reiterate the opening and the connection to the district.

## Speak at an Event

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Consider asking legislators or staff people to speak at an event such as a conference, community meeting, or board meeting. Legislators and staff people welcome the opportunity to share the decision maker's views and get to know people in their district.

## Public Relations and Media

Before approaching the media, determine if your organization has a formal policy for handling public relations and media. If you do not have one, you should develop one. Some of the key questions that your Public Relations and Media policy should address are provided below:

### Responding To Inquiries

- Who responds?
- What information can you give?
- How will you respond to a crisis?

### Who will coordinate?

- Spokesperson?
- Outside communication specialists?
- Combination – how is coordination ensured?
- Is a media policy in place?

### Who will decide?

- Which staff member?
- Counsel?
- Outside advisors?
- Decision team?

### The Message

- Proactively release message?
- What facts are known?
- What facts are unknown?
- Impact on possible litigation?
- Audiences?
- Likely inquiries?

### Who will deliver message?

- Executive director?
- Legal?
- Public relations consultant?



- Find a list of media sources for your area at <http://capwiz.com/housingcenter/home/>
- NAHRO members can login to access a Media Training Guide in the members-only area at: <http://www.nahro.org/nahros-media-training>

## Working with the Media

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A few general tips for working effectively with the media are offered below:

### Avoid Problems

- Keep board, staff, residents informed
- Use resident advisory boards
- Seek public relations help with perceived issues
- Plan ahead
- Issue press releases, attend conferences

### Meet Deadlines

- Newspapers need the story in by 3:00 pm the day before. Weekly papers will have deadlines a few days prior to their published schedule
- Television news has daily deadlines - ideally hours prior to the news broadcast
- Media events are best held before 3:00 pm Monday through Thursday
  - Schedule on Monday for optimal delivery that meets media deadlines
  - Avoid Fridays for holding press conferences or events
  - Weekends can be good for radio stories or non-profit news

### Be Prepared

- Before reaching out to any reporter, read some of their previous articles
  - Mention a recent article (if it's relevant) in your e-mail to them
  - Media appreciate knowing that their articles are being read
- They have deadlines
  - Reporters at daily newspapers have deadlines, around 3:00 pm every day
  - If you call a reporter, always ask if they have a minute to talk. This shows you are being respectful of their time; they love that
- You are always on the record
  - Never tell a reporter something you don't want printed - **Ever**
- Don't underestimate the importance of follow up
  - Reporters get hundreds (sometimes more) of e-mails per day. Yours is likely to get lost. Follow up by phone or e-mail
- Know when to take 'no' for an answer
  - Not every story you share will interest the reporter. Don't be discouraged – instead ask why it's not interesting or a fit for the publication. It will help ensure future success and show that you respect him/her
- Provide a fact sheet. Visuals, such as photographs, are also useful
- Avoid jargon
- Be truthful and accurate – never speculate
- Be interesting

## Gaining Media Interest

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Media is interested in newsworthy events that can capture the hearts and minds of their audience. While they can focus on conflict or controversy, they also look to share stories of success, progress, and problem solving. Share real stories, offering sound bites or quotable statements they can use. Look to the media to uncover what the press views as newsworthy housing topics for current discussions. Locate articles and messages that are timely and relevant to your issues. You may be able to pull quotes or find references to other source materials from the articles that appear in the national or local press that can be used to bolster your own message.

Examples of the types of stories the media is looking for:

- Current and local statistics, number of residents, number of people on the wait list, and demographic statistics
- Local story of success
  - Specific residents who have grown up living in public housing or are a current role model within the community
  - Unique programs that benefit residents, such as literacy initiatives, community gardens, and self-sufficiency programs
- Highly visual events that attract local politicians or well-known members of the community
- Stories that have not been told before. Media love telling a story for the first time
- Use Current events. News can get old fast. Pitch the media timely information as soon as you have it

## Approaching the Media

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Some ways you can approach the media include:

- Media alerts/Advisories – Announcing upcoming events
- Making a community calendar available on your website
- Letters to the editor
- Opinion editorials
- Articles written for publication
- Press releases
- Press conference
- Public service announcements (radio or television)

Do you provide health or community services at your property? Consider creating a PSA for the radio to inform the public that it is available and as an opportunity to share your website information and link the public to your good works.

## Your Media Outlets

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Remember that sometimes YOU'RE the media. You can ask your legislators to write an article for your agency's newsletter (if you have one) or to write something for your state chapter communication. In truth, they will likely edit and sign their name to something you have drafted. The article could outline their commitment to public housing issues, their engagement in a particular program, or their connections to residents. This is a great way for your legislators to connect with people in their district as well as for you to get them on the record in support of your issues.

## Criteria for Media Messages

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Media outreach serves two important purposes: it can heighten public awareness of issues as well as capture the direct attention of policymakers. Options include television, radio, and print advertising campaigns at the local and national level and/or web and social media approaches. Effective media messages meet the following criteria:

**Repeatable:** Messages need to be delivered to an audience through a variety of channels over an extended period of time. A common theme must be clear, whether the message is being delivered in print, on television, on radio, or elsewhere. Truly effective messages are easy for others to repeat. As supporters gain enthusiasm for the message, they must be able to relay their support quickly and easily to others.

**Clear:** Through the message, the audience must be able to identify clearly the issue being addressed and the solution proposed. Nuances of the issue are best saved for follow-up materials available through a website or other resource.

**Concise:** Offer a very limited number of points (usually no more than one or two). Too many arguments, even if they are strong points, can muddy the message. Additional points can be saved as follow-up materials.

**Relevant:** Create a message that the audience will understand and can relate to. Develop a 'core' message that resonates with the most people and as possible, identify targeted messages for targeted audiences.

**Credible:** Audiences respond well to messages coming from sources they find credible. As different audiences relate to different sources, part of the advocate leader's job is to identify which message will resonate best with a particular audience.

**Action-Oriented:** Make sure the audience knows what to do to help further your cause.

## Social Media

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Social media is a virtual community or network where people connect and interact to share and exchange information and ideas, and engage others with similar interests.

Consider what you hope to achieve by being active on social media.

- Do you want to use it as a tool for communicating with your residents?
- Do you want to highlight positive news to your community and beyond?

## Types of Social Media

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While there are many social media networks, the most effective for use in advocacy are Facebook, YouTube, Twitter and Linked-In. These social media networks are very effective for both learning about legislators as well as delivering positive messages.

- **Facebook's** popularity makes it a great tool to communicate and interact with your local community and your residents. It is not recommended that you use your personal Facebook page, rather consider creating a page for the organization. Facebook provides ways for organizations to monitor and manage their page, share their stories and connect with others. To create a page that represents an organization, you must be an official representative.

Search Facebook for Cuyahoga Metropolitan Housing Authority's (Ohio) organization page. View some of the ways they use Facebook to share stories about the success of their programs and the positive impact public housing is making on the lives of their residents.

Link at: <https://www.facebook.com/#!/pages/Cuyahoga-Metropolitan-Housing-Authority/312521445521138?fref=photo>.

- **Twitter** is a good way to connect with community and industry leaders. You can begin by following *ReThink Tweets* on Twitter, where you will discover positive messages you can share on your own Twitter account.
- **YouTube** is a great place to post and share videos. Search on YouTube for the video *Housing Authority of the City of High Point: Housing Matters*. The housing agency leveraged the *ReThink: Why Housing Matters* national campaign theme, involving local officials and capturing personal stories of residents that lived in public housing to share how public housing has mattered in their lives and in the community.

Link at: <http://www.youtube.com/watch?v=02EZ8Ntf4Wg>



## Social Media Pros and Cons

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### Pros

- Small organizations with limited resources can engage with many users
- Large organizations still give users a personal touch
- Allows you to engage with your residents
- Fosters a positive relationship
- It is a way to elicit feedback for improvements
- Reaches a broad audience of community and residents and business partners
- Offers a quick and easy way to communicate information to the public during a crisis

### Cons

- Opens the door for complaints and backlash
- Negative social media opinion spreads quickly to many users
- If you become lax in posting updates, followers may lose interest

## Social Media Policy

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Does your housing agency have a policy on communicating with the media? Who is the official spokesperson at your agency to deal with the press? Do you have statements prepared in advance of a crisis to provide to the media? It is important to have a policy on public relations and media, and that should include setting the ground rules for social media.

If your housing agency makes a decision to utilize social media, it will be important to develop a *Social Media Policy*. This policy will guide your staff and your agency about who is allowed to represent the housing agency on issues and provide employees clear guidelines about what is acceptable or unauthorized.

Designate one to two employees to serve as ‘Community Managers’

- This person(s) should be someone you can trust to create appropriate content
- Prepare an internal set of rules/etiquette, i.e., proper grammar and spelling, focusing on positive news
- Ensure everyone with posting access talks with the right people for content
- Create a rough outline of possible topics, upcoming events/programs, and photo opportunities that you think would be interesting to your followers
- Develop a crisis plan and consider preparing ‘canned responses’ without emotion
- How to address on-site emergencies, i.e., power outages, snow removal, fire, and violence

- Consider posting ‘House Rules’ on Facebook that spell out in advance what you will delete, how you will handle inappropriate and/or off-topic remarks and what you will enforce
- How will you respond to potentially adverse comments?
- Deleting – what will and will not be deleted?
- Inappropriate comments – should be deleted according to House Rules
- Enforcing – frequently disruptive person should be removed as a follower or blocked
- Dealing with negative publicity on social media
- It is important when dealing with a negative individual or instigator to keep emotion out of the situation
- It is important to portray your organization’s core values throughout the negativity
- Be sincere and transparent
- Take ownership of mistakes
- Engage supporters
- How will you promote social media accounts to your residents, community, and friends?
- Consider developing flyers, letters, or e-mails to residents, and community supporters

### Using Social Media for Advocacy

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There are numerous ways you can learn about and contact legislators and their staff.

Find your legislators’ Facebook pages to:

- Gather information on their votes and policy interests
- Get updates on their visits to the district and potential town hall meetings
- Comment positively on their work
- Post information about your own event, programs, and services

Follow your legislators on Twitter and use it to get:

- Up to the minute information on key votes
- Details on upcoming events
- Use Linked-In, a professional social media network, to find connections. When trying to contact a legislator’s office, Linked-In can help you find people you may already know who know the legislator

Subscribe to your legislators’ YouTube channels. This will help you:

- Learn how they talk about issues as you watch their speeches while Congress is in session
- See what they look like in case you see them in the district

## Pull it all Together - Your Campaign Action Plan

Some examples of specific actions you can take toward achieving each type of goal are provided in the chart below. For example, the steps needed for a campaign to preserve funding for the Choice Neighborhood Initiative program at \$400M might include:

- Meet with staff of the relevant committee
- Arrange strategy meeting with legislative champions
- Create list of grant beneficiaries highlighting the positive work that has been done
- Coordinate efforts of pro-housing coalition
- Ask advocates to create one-pagers outlining the benefits of the program in their communities



### Advocate Toolbox

[Campaign Action Plan](#)  
[Worksheet](#)

| Action                  | Legislative and Regulatory Goals  | Awareness Raising Goals   | Network and Coalition Building Goals  |
|-------------------------|---|---|---|
| <b>Research</b>         | <ul style="list-style-type: none"> <li>• Identify champions</li> <li>• Review previous proposals</li> <li>• Consider strategy</li> <li>• Review timing</li> </ul>   | <ul style="list-style-type: none"> <li>• Develop arguments through surveys and other analysis</li> <li>• Identify venues for delivering the message</li> <li>• Identify potential target audiences</li> </ul> | <ul style="list-style-type: none"> <li>• Identify advocates</li> <li>• Identify potential coalition partners</li> <li>• Outreach to appropriate entities</li> <li>• Develop strategy</li> </ul>                   |
| <b>Coordination</b>     | <ul style="list-style-type: none"> <li>• Draft preliminary language</li> <li>• Secure supporters, sponsor, and cosponsors</li> <li>• Develop messages and arguments</li> </ul>  | <ul style="list-style-type: none"> <li>• Develop strategy for utilizing multiple outreach methods</li> <li>• Develop message that resonates with target audience</li> </ul>                                   | <ul style="list-style-type: none"> <li>• Match advocates to appropriate audiences</li> <li>• Train advocates</li> <li>• Coordinate activities of coalition partners</li> </ul>                                    |
| <b>Primary Activity</b> | <ul style="list-style-type: none"> <li>• Have legislation or proposed rule introduced</li> <li>• Participate in hearings</li> <li>• Assist with vote counts</li> <li>• Conduct advocacy activities to support passage of legislation</li> </ul> | <ul style="list-style-type: none"> <li>• Create outreach pieces, whether ads, websites, one-pagers or the like</li> <li>• Work with delivery outlets for optimal impact</li> </ul>                            | <ul style="list-style-type: none"> <li>• Identify key activities for advocates</li> <li>• Coordinate advocate activity with other work</li> <li>• Develop campaign for additional advocate recruitment</li> </ul> |
| <b>Follow-up</b>        | <ul style="list-style-type: none"> <li>• Work with regulatory agency on next steps</li> <li>• Work with legislative champion on any needed changes or updates</li> </ul>  | <ul style="list-style-type: none"> <li>• Capture any successes</li> <li>• Assess effectiveness and shift strategies for next campaign as necessary</li> </ul>   | <ul style="list-style-type: none"> <li>• Thank advocates</li> <li>• Create new options for involvement</li> </ul>   |

# A = Assess and Follow Up

## LEARNING OBJECTIVES

- Explore ways to build and enhance team member skills
- Learn the importance of assessing your progress

## Build Team Member Skills

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As you start implementing your *Advocacy Plan*, you may find that less-experienced advocates do not have a good understanding of their role in the process or how to be effective in delivering the message. That's where you come in. In helping them build their skills it will be easier to implement your campaign plan and move your effort forward. This means that you need to provide them with some training resources, whether an in-person session, webinar, or materials on your website.

## Training Topics

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Some training topics you might consider include:

**Why citizen voices matter:** Effective advocate training almost always start with a discussion of the power of constituency. Citizen advocates need to understand that most elected officials and their staff are eager and excited to meet with real, live constituents and will respond more readily to their requests than those of non-constituents.

**A corollary - what influences elected officials:** Policymakers are influenced by a variety of factors, including their own principles and passions, their friends, family, staff, party leadership, and, most important, their constituents. Advocates need to understand how these basic factors will relate to their outreach to legislators and staff.

**The Importance of 'The Ask':** Many advocates are satisfied with having a generic discussion with policymakers about the benefits or downsides of their particular policy issue. However, what matters most is the action a policymaker eventually takes (or doesn't) on the issue. Having a vague or even positive conversation is ultimately far less useful than asking a policymaker to take a specific action, whether it is to support a piece of legislation or visit a facility in the legislator's district. Advocate leaders should help participants understand and practice the key policy 'asks' as well as other easier 'asks' (such as site visits and public statements) to capture a policymaker's interest and support.

**Understanding the Audience and Framing the Message:** Advocates should have both a macro- and micro-level understanding of the audience with whom they are communicating.

**Effective Messages from Advocates:** In many cases, advocates believe that scientific research, facts, figures, statistics, and similar types of arguments are the most effective. However, the most important thing any advocate needs to know in developing and delivering a message for policymakers is that they have something unique and valuable to contribute.

Advocates should recognize that their job is to make sometimes esoteric policy issues real for the policymaker. They can achieve this goal by telling a personal story. Hence, any advocacy training session should include opportunities for participants to develop their own compelling stories.

**The Importance of Following Up:** Most advocates do not follow up on their communications with policymakers - and then wonder why their representatives don't do what they were asked to do.

## Conducting a Training

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The most common form of in-person training is to offer a workshop or speech either at an annual conference or as part of an advocacy specific event. Many organizations also offer advocacy training as one topic for discussion during leadership and board meetings. Whichever venue is used, consider the following strategies:

**Tailor the Content:** The content chosen for the presentation should be tailored to the audience. Some of the likely audiences for advocacy training include:

- First timers: The basics of effective advocacy should be covered with this group.
- Experienced advocates: These individuals may have more interest in topics like 'Building Long Term Relationships with Policymakers.'
- Board members and other leadership: Board members and others in leadership positions have an extra responsibility to be effective advocates. They will likely need both basic advocacy skills as well as information on how to lead others.

**Active learning:** In general, workshop attendees learn by doing. Training sessions should include many opportunities for participants to work through the steps of effective advocacy. For example, participants should be given the opportunity to actually develop their ‘ask’ and perhaps present it through role-playing.

**Utilize successful advocates to provide case studies and positive examples:** Nothing encourages other advocates like success. Advocate leaders and trainers should work to identify those within the network who have achieved something with their policymakers, whether it’s getting a bill passed or simply getting a meeting, and ask them to talk about their work and how basic advocacy techniques helped them deliver their message.

**Role-playing:** Role-playing can be a great way to inspire advocates. By giving participants an opportunity to practice ‘making the ask’ or ‘telling a story’ in the safety of the training environment, they will feel more comfortable undertaking these activities when it comes time to attend the meeting.

## Training Options

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Advocate leaders have a variety of options available for delivering training information.

**Active training:** The term ‘active training’ is used here to describe instructor-led sessions in which a trainer works with a specified group of advocates over a specific period of time. This can be done through traditional in-person training sessions as well as online interactive training approaches, such as webinars and audio-conferences.

**Self-paced training:** The term ‘self-paced training’ is used to describe the development of courses and materials that advocates can review at their own pace. These may include online courses or video recordings.

**Advocate toolkits:** Many organizations provide training-style materials through a toolkit approach as opposed to a formal course.

## Assess Progress and Follow-Up

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Perform a careful self-assessment of your progress at regular intervals to make sure you are reaching all your goals and sticking with your deadlines. Be sure to capture any successes. It is important to remember to thank the advocates who are supporting the campaign, and to help keep them motivated by recognizing each success. Check on the progress of your teams to make sure they are working together efficiently and effectively.

You may need to set up new campaigns to work with a regulatory agency on next steps, to work with a legislative champion on needed changes or updates, or to create new options for involvement. You may even want to consider who else can be recruited to support your issue, and perhaps develop a campaign for additional advocate recruitment.

Advocacy is all about persistence and follow up. As such, you should have a plan for communicating with legislators throughout the year and remember to schedule follow-up activities on your Advocacy Calendar as well.

Many of the action steps you take will require additional follow-up, particularly if you are planning a meeting, or have sent a letter or made a phone call to request conducting a site visit, are coordinating a town hall meeting, or planning a meeting in the local office. Frequently, you will use e-mail to follow up on your request.

To get results, be sure to follow up on your original request so they know you are seriously committed to working on the issue with them.

# Advocate Toolbox

## Existing Sources of Advocacy Material

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You may wish to take a few minutes to learn a little more about the various advocacy programs of key public housing organizations. Some ideas are provided below. It should be noted that some organizational websites may be available to members only.

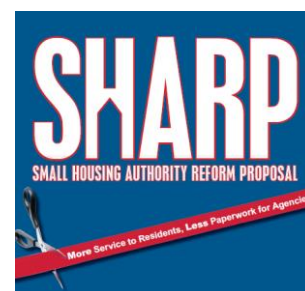
- *ReThink: Why Housing Matters* at [www.rethinkhousing.org](http://www.rethinkhousing.org)
- The National Association of Housing and Redevelopment Officials at [www.nahro.org](http://www.nahro.org)
- The Public Housing agencies Directors Association at [www.phada.org](http://www.phada.org)
- The Council of Large Public Housing agencies at [www.clpha.org](http://www.clpha.org)
- The National Council of State Housing agencies at [www.ncsha.org](http://www.ncsha.org)
- Rental Housing Action at [www.rentalhousingaction.org](http://www.rentalhousingaction.org)
- The Affordable Housing Investors Council at [www.ahic.org](http://www.ahic.org)
- The Corporation for Supportive Housing at [www.csh.org](http://www.csh.org)
- The Council for Affordable and Rural Housing at [www.carh.org](http://www.carh.org)
- The Housing Partnership Network at <http://www.housingpartnership.net/>
- The National Affordable Housing Management Association at <http://www.nahma.org/>
- The National Housing Conference at <http://www.nhc.org/>
- The National Low Income Housing Coalition at <http://nlihc.org/>

## Industry Supported Issues (Joint or Coalition Support)

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There are reforms and proposals that your agency may wish to support. For example, small housing agencies may be interested in supporting the reforms proposed in the SHARP Report jointly developed by NAHRO and PHADA, and sponsored by HAI Group. You can find this report at:

- [www.phada.org/pdf/SHARPPublication.pdf](http://www.phada.org/pdf/SHARPPublication.pdf)
- <http://www.nahro.org/SHARP>





## Public Housing Authorities Directors Association (PHADA)

PHADA developed a two-page flyer, *Public Housing's Critical Value to Communities*, with messages about the value of public housing in a community. The information found in the flyer has been reprinted below. You will find the actual flyer on the PHADA members-only area of their website at: [phada.org/Critical Value to Communities](http://phada.org/Critical Value to Communities).



### Public Housing's Critical Value to Communities

Public housing is community-owned housing that, in partnership with the federal government, provides safe, decent, and affordable rental units for some of the neediest families in our cities, towns, and counties - in all fifty states. Key points the publication makes about public housing:

- Serves low-income households including many with special needs
- Provides stable homes to female-headed households with children
- Provides a stable foundation for struggling families
- Residents have an average annual income of \$13,839
- Is locally managed and maintained
- Is an 'economic generator'
- Is the most cost-efficient way to provide safe, decent, and secure homes
- Operate most of the two million Housing Choice Vouchers
- Carries an enormous, costly, and outdated federal regulatory burden

PHADA created a 52-page resource called *Preserving Public Housing*. It is a great resource to identify housing issues. It is available to PHADA members at <http://www.phada.org/pdf/PreservingPublicHousingBooklet.pdf>. Topics include:

#### Incentivizing Cost Savings and Increasing Revenue

- Genuine Options Available to Increase Public Housing and Section 8 Revenues
- House Subcommittee Considers Minimum Rent Increase
- Blending Section 8 and Public Housing Targeting Could Reduce HAP Expenses
- Potential Revenue from Rents Based on Annual Income
- Public Housing Energy Conservation Incentive
- HUD Should Reset the Frozen Rental Income Provision for Three Additional Years
- Frozen Rental Income Provision Lapses

#### Provide Increased Program Flexibility

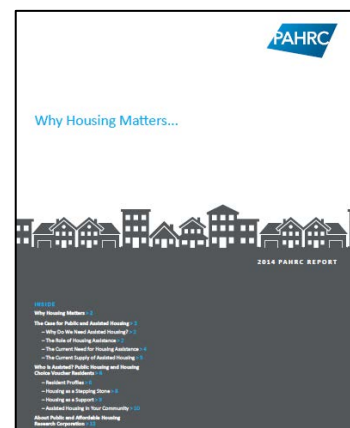
- Moving to Work (MTW) Expansion Would Help Save Assisted Housing Program
- A Small Housing Authority Reform Proposal Based on a HUD Commissioned Report
- Convert Portion of Public Housing to Project-Based Model
- Principles for Recapitalizing and Preserving Public Housing Stock

## Public and Affordable Housing Research Corporation (PAHRC)

[www.pahrc.org](http://www.pahrc.org)

Visit PAHRC's website to find key statistics that may be useful for your messaging, and website or social media posts. PAHRC publishes an annual PAHRC Report, *Why Housing Matters*.

PAHRC also publishes studies about the impact and importance of public housing. The website provides information about of the economic benefits public housing has on its local community based. A good resource is *Assessing the Economic Benefits of Public Housing* (2007), a study performed by Econsult Corporation and sponsored by HAI Group. The results reflect not only the direct economic impact public housing brings, but also the indirect activity.



Key highlights of this study include:

- Public housing expenditures contribute significantly to local economies
- Public housing is a critical resource for low wage workers
- Public housing plays an essential role in the nation's efforts to preserve affordable housing
- Public housing has been significantly underfunded

## Joint Center for Housing Studies at Harvard

[http://www.jchs.harvard.edu/research/state\\_nations\\_housing](http://www.jchs.harvard.edu/research/state_nations_housing)

<http://www.jchs.harvard.edu/americas-rental-housing>

A good resource is the *State of the Nation's Housing*, an annual report put out by the Joint Center for Housing Studies at Harvard.

## National Low Income Housing Coalition (NLIHC)

<http://nlihc.org/involvement>

NLIHC encourages advocates to get involved. Their website offers many advocacy tools, including housing profiles and key facts localized by state and congressional district levels, and an *Advocacy Guide* that provides detailed overviews of most housing programs. For the last 25 years, NLIHC has produced an annual report, *Out of Reach*, to show the gap between a living wage and the cost of rents. Housing advocates can find useful facts and messages in this report. To view the *Out of Reach 2014* report, go to <http://nlihc.org/oor/2014>.

## National Housing Preservation Database (NHPD)

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<http://www.preservationdatabase.org/>

NLIHC also partnered with HAI Group to create a tool to help research and preserve the available stock of affordable housing. Uncover more about housing in your own community, and explore the information available in the database.

## Housing Assistance Matters Initiative

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<http://www.urban.org/housingaffordability/>

HAI Group and Urban Institute partnered together to help inform the public debate about assisted housing policy and to strengthen policy outcomes, HAI Group partnered with Urban Institute (UI) to create the *Housing Assistance Matters* initiative. Delivering informational articles, maps, and animated videos, this initiative provides insight and highlights research and analysis about the need for and benefits of public and assisted housing and how it impacts health, quality of life and access to opportunity. On Google, search for ‘*Housing Assistance Matters Initiative*’ for the latest information.

An interactive map was developed that provides the affordable housing gap that exists in communities. Select your state and county on the map, and watch the sidebar information update with your local results. Share this information to support your message about the growing need for affordable housing in your own community, and nationally. A key finding from this work shows that *“many Americans struggle to afford a decent, safe place to live in today’s market. Over the past five years, rents have risen while the number of renters who need moderately priced housing has increased. These two pressures make finding affordable housing even tougher for very poor households in America.”*

Facebook: <https://www.facebook.com/centeronbudget#!/urbaninstitute>

Twitter: <http://twitter.com/urbaninstitute>

Blog: <http://blog.metrorends.org/>

Pinterest: <http://www.pinterest.com/urbaninstitute/>

## *ReThink: Why Housing Matters*

[www.ReThinkHousing.org](http://www.ReThinkHousing.org)

Facebook: [www.Facebook.com/ReThinkHousing](https://www.facebook.com/ReThinkHousing)

Twitter: [www.Twitter.com/ReThinkTweets](https://www.twitter.com/ReThinkTweets)

YouTube: [www.youtube.com/ReThinkHousing](https://www.youtube.com/ReThinkHousing)



HAI Group launched a national public awareness campaign in collaboration with NAHRO, PHADA, and CLPHA to encourage the public to realize the benefits that public housing agencies offer to the greater community. *ReThink* offers information and effective core messages for the public housing community.

Embed the YouTube videos on your own website, or share to help support your own message. View videos of personal stories where housing assistance has impacted lives.

## *Housing America*

<http://www.housingamericacampaign.org/>

Housing America's mission is to raise national awareness of the need for and importance of safe, decent, and affordable housing through advocacy, education, and empowerment. The Housing America campaign works to elevate the conversation around the importance of meeting our nation's housing and community development demands in numerous ways.



Housing America supports advocates in their efforts to educate community members and stakeholders about housing's critical role as a foundation for a stable life and the need for investment in and preservation of our nation's aging housing inventory.

Visit the Housing America website to learn about Housing America month, see what local communities have planned in the past, join the campaign, or view a few of their Congressional Relations coalitions. Understand more about public perception of housing issues through Housing America's Zogby Polls, participate in the annual calendar contest, listen to assisted-housing success stories, or view sample interview questions to share your own residents' stories.

Empowering past and present residents and clients of affordable housing programs and local stakeholders is one of the most effective ways to communicate the positive impact of programs. Housing America shares the stories of housing assistance to amplify the message of why home is so important.

View the *Voices* video at: <http://www.youtube.com/watch?v=0-tVCFQwEFM>

View *What Home Means to Me 2014* at:

<http://www.youtube.com/watch?v=U7URwZxsTA&feature=share&list=UUusfePvgJS8qjvrqV6Pwgdg&index=1>

## Advocacy in Action

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Get ideas for developing your own materials from some of these award-winning examples of advocacy in action!



### Idea in Action: Creating and Coordinating a Policy Agenda

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Connecticut Housing Finance Agency

<http://www.ncsha.org/about-hfas/annual-awards>

Connecticut Housing Finance Authority (CHFA) understands the value of creating a policy agenda. In 2013, their application for the National Council of State Housing Agencies (NCSHA) award of excellence for legislative advocacy was successful. Their legislative priorities are available on their website, and some excerpts are provided below:

- Co-Sponsor successors to H.R.3661 and S.1989
- Preserve and Strengthen Tax-Exempt Housing Bonds
- Preserve and Strengthen Low Income Housing Tax Credits
- Authorize 'basis boost' for state priorities
- Support Key HUD Funding for Section 8 Project-based Contracts, HOME, Choice Communities/Hope VI
- Obtain A Strong State Housing Finance Agency (HFA) role In Housing Finance Reform
- Establish State HFA's as a partner

The level of specificity in their agenda resulted in, among other successes, support from each member of Connecticut's Congressional delegation for critical legislation. Every legislator signed on as a co-sponsor of legislation to make the temporary nine percent floor for volume cap housing credits permanent. Connecticut was the first delegation to reach this milestone in 2012. This strong policy agenda helped make that goal a reality.

Consider how your agenda coordinates with others in your industry. For example, Connecticut Housing Finance Authority coordinates its policy messages closely with state government through the state's Washington office. The governor's office clears the CHFA's priorities, reviews the presentation materials beforehand and attends the briefing to show gubernatorial support for CHFA's agenda. This approach ensures that the CHFA works within both the letter and the spirit of state law and has the added bonus of bolstering support within the Connecticut delegation.

## Idea in Action: Localizing Data and Information

Ohio Housing Finance Agency (OHFA)

<http://www.ohiohome.org/2012LegislativePublication.pdf>

*Working to Make Affordable Housing a Reality for Ohio Communities*



Follow the Ohio Housing Finance Agency's lead with its *Working to Make Affordable Housing a Reality for Ohio Communities* brochure. In their application for an award of excellence from the National Council of State Housing Agencies (NCSHA) they presented a piece that includes 18 individual pages devoted to each of Ohio's Congressional districts.

Every page features a photo and brief description of a community that received an allocation of tax credits from OHFA. Charts and graphs accompany each page and explore the scope of OHFA's impact on the entire district with a breakdown of OHFA funding awarded in the district, the type of housing provided, and information about the district's residents. These sections are accompanied by a map of Ohio, detailing the number of first-time homebuyer mortgage loans provided by county.



## Idea in Action: Form Alliances

California Association of Housing agencies

[www.CAHAhousing.org](http://www.CAHAhousing.org)

California housing authorities discovered a need to join forces to build an effective industry coalition after a fierce legislative battle to eliminate redevelopment housing authorities. The battle left public housing advocates scrambling to address concerns. It became very clear, very quickly that the industry needed a unified voice if they wanted to continue the battle. That is how the California Association of Housing Authorities (CAHA) came to be. Organizations within the state worked on a joint *Legislative Focus* paper for distribution locally and at NAHRO's Legislative Conference. After less than a year, the CAHA held its first California Legislative Conference with accompanying calls upon California legislators. Now the organization boasts over 65 member authorities and has been invited to testify at legislative committee hearings about the importance of redevelopment programs in the state. They have become a powerful voice for public housing in funding and policy battles in the state legislature.

## Idea in Action: Building Coalitions

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Maryland Affordable Housing Coalition (MAHC)

<http://nlihc.org/whatwedo/recognition/slo-award>



The Maryland Affordable Housing Coalition was awarded the National Low Income Housing Coalition's *State and Local Organizing Award* for making a real difference in the advocacy arena. The MAHC's work resulted in the new Rental Housing Works Initiative, which provided over \$17.5M in state funding for rental housing.

The NLIHC's award statement told the story:

*Recognizing Governor Martin O'Malley's priority of including a major jobs package in his FY13 budget, MAHC crafted a proposal for the new program, meeting with the Maryland Department of Housing and Community Development, the governor's office, and key legislative budget leaders, and emphasized the jobs that would be generated through greater state investment in affordable rental housing developments. MAHC also coordinated outreach to the governor and the state's budget secretary among its 155 member organizations.*

As a result of these efforts, Governor O'Malley announced that he would maintain existing funding for rental housing programs intact in his FY13 budget, and requested an additional \$15 million for the new initiative. Shortly after this announcement, MAHC held a Housing Day advocacy event in Annapolis, Maryland. Over 200 advocates attended, meeting with their legislators and expressing support for the initiative. The legislature ultimately increased funding even beyond the governor's request, allocating \$17.5 million to the Rental Housing Works Initiative.

The initiative had great success in its first year and Governor O'Malley recently included \$25 million for the program in his FY14 budget, a \$10 million increase over last year's budget request.



## Idea in Action: Building Coalitions

Michigan State Housing Development Authority (MSHDA)

<http://www.ncsha.org/about-hfas/annual-awards/legislative-advocacy/federal-advocacy>



The Michigan State Housing Development Authority (MSHDA) understands how to build coalitions, as well as how to reap the benefits. MSHDA's strong work in creating advocacy brochures that highlight the commitment of other opinion leaders within the community to the public housing cause earned the National Council of State Housing Agencies (NCSHA) annual *Award of Excellence*. The materials emphasized the importance of developing partnerships and building coalitions with investors, businesses, nonprofits, and local governments.

MSHDA reached out to local civic leaders, elected officials and others to obtain permission for attribution and approval of quotes, localized data, and photos of local grantee success stories. MSHDA's legislative brochures feature quotes from leaders and partners with nonprofits, city managers, county executives, downtown development directors, builders/construction company owners, community planning and development directors, CEOs, mayors, and many others. In building this strong coalition, the MSHDA was able to connect on a deeper level with Michigan policymakers and their staff, succeeding in gaining their support for the Low Income Housing Tax Credit.

## Idea in Action: Promoting Program Impact

Housing Authority of the City of Freeport, IL

<http://www.freeporthousing.org/>

The Housing Authority of the City of Freeport (HACF) (Illinois) understands the value of a powerful Advocacy Team in generating strong Congressional support. Through a range of education programs in the areas of health, education, employment, youth and empowerment, HACF has increased knowledge, skills and personal development among residents and community leaders. Over 1,000 people participated in programs related to family self-sufficiency, employment, and workforce development.

In addition, HACF's Capital Fund improvements in the areas of energy efficiency and security have helped build noticeable support within the federal government. Interactions with federal agencies have included a partnership with the Department of Energy's Better Building Challenge, a Rental Assistance Demonstration application and the ACT Key Train and Work Keys program. Multiple national organizations such as NAHRO and PHADA have recognized this superior work through various awards and leadership positions. Perhaps most important, Representative Cheri Bustos (Illinois) has become engaged through a letter to HACF congratulating the organization on its achievements and pledging to work together toward



A group of hands holding up colorful house-shaped puzzle pieces. The puzzle pieces are in various colors: purple, red, blue, yellow, green, and light blue. The hands are of different skin tones, suggesting a diverse group of people. The background is white.

<http://housing.mt.gov/content/FAR/HCT/docs/FederalHousingProgramsInMontana.pdf>



to a website where a PDF version of the entire document can be referenced.



## Idea in Action: District Meetings

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Connecticut Housing Finance Agency (CHFA)

<http://www.ncsha.org/about-hfsa/annual-awards>



**Are District Meetings Effective?** Absolutely. Just ask the staff and leadership at the Connecticut Housing Finance Authority (CHFA), winner of the National Council of State Housing agencies *2013 Legislative Advocacy Award*. CHFA found that instead of flying to Washington, DC, there were advantages in remaining in Connecticut and having face-to-face visits at the local district office or state office.

Some advantages included:

- Increased ‘face time’ with each member of Congress
- Increased availability on schedules
- Increased, uninterrupted, and undistracted focus on issues

With Connecticut relatively close to Washington, the members were often available on Mondays and Fridays in addition to scheduled Congressional calendar breaks. CHFA found that meeting in the district or state office with a congressman or senator allowed their organization to maintain uninterrupted and undistracted focus on affordable housing both locally and in Congress.

## Tools from A to Z

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From A to Z, this next section of the Toolbox offers worksheets, checklists, and sample letters to assist you in developing the elements of your *Advocacy Plan*. You may not plan to do all of these things, but these checklists and forms will come in handy for the activities you are including in your plan.

## A. Advocacy Agenda Checklist

|   |   |                   |                        |
|---|---|-------------------|------------------------|
| It is essential to understand what you can, and cannot, do.<br>Review federal lobbying restrictions, the Hatch Act, and local or state policies |   |                   |                        |
| <b>Identify Your Objectives - Mission, Vision, Goals</b>  |   |                   |                        |
| <b>Define HOUSING AGENCY Mission</b>  | <b>Sample Mission:</b> <i>'Our mission is to ensure the provision of quality affordable housing opportunities in viable communities for lower income households.'</i>                       |                   | <b>Your Mission:</b>   |
| <b>Define Vision</b>  | <b>Sample Vision:</b> <i>'Our vision is for public housing to become an integrated part of the greater community.'</i>  |                   | <b>Your Vision:</b>    |
| <b>Define Specific Advocacy Objective</b>   | <b>Sample Objective:</b> <i>'We support policy initiatives that reduce regulatory burdens for public and affordable housing.'</i>   |                   | <b>Your Objective:</b> |
| <b>Specific Advocacy Mission</b>  |   |                   |                        |
| <b>Develop SMART Goals</b>  | <b>Legislative?</b>   | By when?          |                        |
|   | <b>Regulatory?</b>  | By when?          |                        |
|   | <b>Public Awareness?</b>  | By when?          |                        |
|   | <b>Network Building?</b>  | By when?          |                        |
| <b>Venues for Reaching Goals</b>  |   |                   |                        |
| <b>Determine Venue</b>  | <b>Policy</b>   |                   |                        |
|   | <b>Public / Local</b>   |                   |                        |
| <b>Audience Research</b>  |   |                   |                        |
| <b>List Target Audience</b>   | <input type="checkbox"/> US Senators/Representatives:<br><input type="checkbox"/> Governor/State Officials:<br><input type="checkbox"/> Local Officials:<br><input type="checkbox"/> Other: |                   |                        |
| <b>Identify Audience Support or Opposition</b>  |   |                   |                        |
| <b>Champions?</b>   |   | <b>Allies?</b>    |                        |
| <b>Neutral?</b>   |   | <b>Opponents?</b> |                        |

## B. Advocacy Agenda Worksheet

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### Organization Mission

### Advocacy Mission - If applicable, demonstrate how advocacy connects to the overall Mission

### Vision - Broad statement of policy vision

### Objectives - Purpose advocacy efforts serve and outcome/goal you wish to achieve

### Goals - Specific activities to be undertaken to achieve objectives

## C. Campaign Action Plan Worksheet

| #  | Campaign Step   | Timeline | Your Action/ Findings |
|--|---|----------|-----------------------|
| <b>Identify Objectives</b>                     |   |          |                       |
| 1  | Review federal lobbying restrictions, the Hatch Act, and local or state policies. <b>It is important to begin with an understanding of what you can, and cannot do</b>                |          |                       |
| 2  | Develop <i>Advocacy Agenda</i> (Mission, Vision, objective, goals)  |          |                       |
| 3  | Determine the Venue - federal, state or local?  |          |                       |
| <b>Design Action Steps</b>                     |   |          |                       |
| 4  | Integrate advocacy into existing operations. Form an Advocacy Team. Consider ways employees, commissioners and residents can participate and decide if you will form an Advocacy Team |          |                       |
| 5  | Assess resources (money, time) and budget for these resources   |          |                       |
| 6  | Decide if you will build coalitions or engage other allies  |          |                       |
| 7  | Identify and segment your target audience   |          |                       |
| 8  | Conduct detailed research on specific policymakers. Review previous proposals or legislation and issues tab at Congress.gov   |          |                       |
| <b>Design Effective Messages and Materials</b> |   |          |                       |
| 9  | Develop message. Start with phrase: 'As a result of this communication, my audience will....' Write down a few things you believe will engage your audience                           |          |                       |
| 10   | Review website resources of industry associations. Review <i>Advocacy Agenda</i> and gather facts that support your cause   |          |                       |
| 11   | Develop a timetable and Advocacy Calendar to schedule activities and follow-up throughout the year  |          |                       |
| 12   | Gather stories to support and bolster key messages  |          |                       |
| 13   | Craft personal messages - tie your issue to issues your audience is interested in (Use SPIT Technique and Message Formula)  |          |                       |
| 14   | Give your campaign a memorable name   |          |                       |
| 15   | Review existing advocacy materials, housing association websites, 'Advocacy in Action' examples   |          |                       |
| 16   | Use 50058 data reports and facts to support your message  |          |                       |
| <b>Engage – Implement your Plan</b>            |   |          |                       |
| 17   | Develop effective materials such as one-pager   |          |                       |
| 18   | Determine your request – what will you 'ask' for?   |          |                       |
| 19   | Determine your action – how will you ask for it?  |          |                       |
| 20   | Consider which delivery method might work best for each action (e-mail, fax, phone, social media, in person)  |          |                       |
| 21   | Select your delivery method   |          |                       |
| 22   | Deliver your message - ask for a response – follow-up   |          |                       |
| <b>Assess Progress and Follow-Up</b>           |   |          |                       |
| 23   | Build team member skills  |          |                       |
| 24   | Assess effectiveness. Capture and recognize success. Shift strategies as necessary for next campaign. Continue follow-up  |          |                       |

## D. Questions When Forming an Advocacy Team

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Some factors to consider in selecting and forming a team:

- Who will serve?
- How will they be selected?
- How many members should be on the team?
- Should alternates be selected?
- How long should the team members serve?
- Who is the team leader?
- Will there be subcommittees?
- How much time does the person have available?
- How interested is the person in advocacy issues?
- Are there talents or skills the person brings to the team that we need?
- Does the person have the respect of fellow employees?
- Will the person conduct themselves in a non-adversarial manner?
- Are all departments represented?
- Are all shifts, locations represented?
- Are Commissioners represented? Resident Commissioners?
- Are residents represented?

## E. Recruiting Volunteers and Advocates Form

*Customize this handout and use it to help supporters understand how they can help.*

### About Us

Our housing agency was founded [year]. We serve [ ] number of people in our area. Our most popular services are [ ]. Our Mission is [ ]

### About You

Name:

Address:

City, State, Zip:

Telephone:

E-mail:

- ☐ How did you hear about our effort?
- ☐ What is your connection to our issues?
- ☐ Have you had any experience with advocacy campaigns in the past? If so, what?
- ☐ Do you know any elected officials personally (local, state or federal)? Please List.
- ☐ Do you have any particular expertise that you might be willing to contribute to the cause? (marketing, legal, accounting, etc.)
- ☐ Please tell us your story. We can use this information to let policymakers know how real people use our resources.
  - How does the housing agency and our services impact your day-to-day life?
  - What services do you use?
  - What needs do you see?

**What We Need You to Do** - To understand the value we bring to the community, policymakers and their staff needs to hear from supporters of our housing agency. Together, we can develop compelling stories that will inspire ongoing legislative and financial support for the work we do.

**How can you help? Glad you asked!** Please identify what you are most interested in doing:

- ☐ Send letters to legislators
- ☐ Review local media for opportunities for letters to the editor and public relations messages
- ☐ Learn about legislators by reviewing their websites and their 'issues' tab
- ☐ Look at pictures of legislators on their websites so you can recognize them if you see them
- ☐ Follow legislators on social media. Identify opportunities to post positive comments
- ☐ Suggest potential opportunities for the housing agency to connect with legislators
- ☐ Ask others if they'd be interested in helping
- ☐ Make phone calls. Call legislators' local offices to find out when they will be holding community meetings and make plans to attend (and bring others!)
- ☐ Put up signs
- ☐ Participate in events

## F. Budget Worksheet

Use the following budget worksheet to identify high, medium, and low options for each. Start with the amount you have available to invest and work back from there.

| Line Item  | High Option | Medium Option | Low Option |
|--|-------------|---------------|------------|
| Overhead (rent, office supplies, phones, etc.)   |             |               |            |
| Staff  |             |               |            |
| Consultants as needed, including those with expertise in: <ul style="list-style-type: none"> <li>• Web design</li> <li>• Public-relations</li> <li>• Messaging</li> <li>• Grassroots development</li> <li>• Media relations</li> <li>• Legislative Day coordination</li> </ul> |             |               |            |
| Computer materials, including advocacy software programs   |             |               |            |
| Hardcopy materials, including brochures, directories, and toolkits   |             |               |            |
| Legislative Day expenses, including travel, meals, additional staff expenses, and materials  |             |               |            |
| Training expenses, both for government relations staff and advocates   |             |               |            |
| Media outreach expenses including TV and print ad buys   |             |               |            |
| Internal research needs, such as publications and clipping services  |             |               |            |
| Travel and conference participation expenses   |             |               |            |
| <b>Totals</b>  |             |               |            |





## H. Recruit Coalition Interest Form

---

Organization:

Name:

Address:

City, State, Zip:

Telephone:

How did you hear about our effort?

What is your organization's structure (member-based, foundation, single-entity, etc.)?

If member-based, how many members do you have and what type (individuals, businesses, etc.)?

What is your organization's connection to our issues?

Have you had any experience with advocacy campaigns in the past? If so, what?

Does your group have any connections to any elected officials personally?

Does your organization have any particular expertise or resources that you might be willing to utilize for the cause?

☐ Marketing

☐ Mailing list

☐ Event

☐ Large Meeting Space

☐ Media Relations

☐ Website

☐ Newsletter

Other:

What activities might you be willing to undertake for the effort?

☐ Mailing to our members

☐ Writing letters to the editor or press releases

☐ Posting information on website

☐ Posting in newsletter

☐ Identifying other potential allies

☐ Providing information at events

Other:

## I. Determining Audience Worksheet

Research and find the answers to the following questions to help you determine which group, and which members of the group may impact your issue.

1. Who funds public housing services in your area?
2. Are there multiple sources of funds? If so, what are they?
  - ☐ Local ☐ Federal
  - ☐ Regional ☐ Private funding
  - ☐ State
3. Who are the local decision makers in your area? *(Hint: Try Google search. List names/titles. Example: city council members)*
4. Who are local opinion leaders in your area?
  - ☐ Business leaders ☐ Reporters / news editors
  - ☐ Chamber of commerce leaders ☐ Non-profit leaders
5. Who makes the decisions about how funds are spent?  
*(Hint: in many communities local legislators set broad budgets, but local agency leaders make day-to-day decisions)*
  - ☐ Local legislators such as city council members
  - ☐ Local agency heads?
  - ☐ A combination?
6. How do the people who make the decisions get into power?
  - ☐ Are they elected? If so, what jurisdiction do they serve? Who are their constituents?
  - ☐ Are they appointed? If so, who appoints them?
7. What is the process for making decisions about local budgets?
  - ☐ Are there deadlines involved?
  - ☐ Opportunities for public participation?
  - ☐ How are proposals developed?

### Congress

- ☐ Who are my representatives and senators?
- ☐ What is their legislative record and general philosophy?
- ☐ What issues are they passionate about?
- ☐ What committees are my representatives or senators on?
- ☐ Are my representatives or senators newly elected, or more senior?
- ☐ What parties do my representatives or senators belong to?

### Regulatory Agencies

- ☐ Which agency handles the issue?
- ☐ Who within that agency is responsible?
- ☐ Who determines that agency's budget?
- ☐ What is the mission of the agency?
- ☐ What are their priorities?

## J. Questions to Research Your Issue

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Research answers to basic research questions to build a more comprehensive campaign plan. Consider any facts, stories, or information you might share that can provide answers or shed light on some of the following questions. Perhaps you can split up the work by assigning specific item numbers to individuals on your Advocacy Team or coalition.



1. Outline the facts, myths, and values associated with the issue. Find out the results of previous research about the issue or problem
2. How similar issues have been resolved through policy decisions in other places or organizations
3. What those who are affected by the issue think 'should be' in an ideal situation
4. What people believe is maintaining the problem, true or not
5. List who or what is affected by the current state of affairs. Ask: How are they affected?
6. What needs to be done differently to lessen the problem?
7. Define the issue or current policy in neutral terms and generate possible policy related solutions
8. How are neighborhoods affected by the presence of assisted housing? How does development or preservation of assisted housing contribute to neighborhood revitalization efforts? How are neighborhood property values, safety, and quality of life affected by the presence of assisted housing?
9. How effective are efforts to promote work and economic self-sufficiency among households that receive rental assistance? How have these efforts affected program costs? How have work requirements impacted residents in Moving to Work (MTW) programs?
10. How does assisted housing contribute to a city's economic vitality, including its ability to attract and retain a public sector workforce (teachers, police, fire fighters)?
11. How are children's development and education affected by unaffordable housing and residential instability and to what extent does assisted housing resolve these problems for families with children?
12. Does housing instability have implications for adults' ability to get and keep jobs and to what extent does assisted housing serve low income workers?
13. Can assisted housing linked with long-term care services enable the elderly to age in place? To what extent are the elderly served by different types of assisted housing?

## K. Legislator Intel Form



Questions for each member in your policy audience

**Name Policy Audience Member:** \_\_\_\_\_

Political party

Newly elected or more senior?

Any committee participation?

Any ranking leadership positions?

### 1. Why are you relevant?

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> You are a constituent | <input type="checkbox"/> You have subject expertise | <input type="checkbox"/> You have a personal relationship |
|--|---|---|

### 2. Has the policymaker already taken a position on the issue (or a related issue)?

- Position on housing (supporter or opponent?)

### 3. What is the history of the policymaker's support?

*(Hint: In many cases, there may be no previous history on the issue)*

- ☐ Prior vote on the issue or a related issue
- ☐ Public statements
- ☐ Co-sponsorship of legislation

### 4. What party does the policymaker belong to? *(Hint: Useful when no legislation or policy history exists)*

### 5. What does the policymaker care about? *(Hint: Review types of legislation sponsored, what their website says, who they follow on Twitter or Facebook)*

### 6. Do they have any personal connections to the issue?

### 7. Do you, or anyone on your team

- ☐ Personally know them?
- ☐ Actively support them (i.e., volunteer on campaign)?
- ☐ Have past connections (i.e., prior meetings, went to school or worked together)?

Notes on Prior Contacts or Meetings

## L. Creative Message Development Worksheet

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**What is the Objective of the Campaign?** We want to ... *(give purpose of campaign)*

### Venue

- *Proactive or reactive?*
- *Political/policy or social/public awareness?*

### Type of Agenda

- Public laws and ordinances (at city/county, state/province/tribal, or national levels)
- Regulatory policies (at city/county, state/province/tribal, or national levels)
- Executive orders from elected officials
- Business policies and organizational rules and bylaws

**Who are we talking to?** (target audience, audience segment)

### How do they feel about it?

- Champion
- Supporter
- Neutral
- Opponent

**What's the single most important thing to say?** *(capture what you want your audience to think/feel/say after seeing your campaign(s))*

**Messaging Theme:**

**Challenges:**

**Benefits:**

### Research

Conduct detailed research on specific policymakers. Review previous proposals, legislation, or surveys to help develop arguments. Collect and develop personal stories. Research facts that show benefits and successes and support the message.

**What Key Points do we have to support this?**

**What situations can be leveraged?**

## M. Develop a 'One-Pager' Worksheet

### Our Mission

The mission of our agency is...

### Picture of Our program/residence/service

The federal partnership helps us provide a range of different services to our constituents.

| Photo(s)   | Program Summary  |
|--|--|
|  |  |
|  |  |
| <b>TIP- Highlight only one or two programs</b>   | <b>Items you might include...</b>  |
| <ul style="list-style-type: none"><li>• Is there a 'featured' special service you provide?</li><li>• What programs are most popular?</li><li>• How are lives being improved?</li></ul> | <p>How many people use your services?<br/>How long is your waiting list?<br/>Describe the populations you serve (families, children, seniors, veterans, disabled, homeless, displaced by disaster, domestic violence victims, children aging out of foster care, etc.<br/>High percentage of any particular population?<br/>Contributions to economic development?</p> |

### Current Challenges

As our community grows/changes we face a number of important challenges related to issue X

### List one or two specific challenges

- 1.
- 2.

### How Elected Officials Can Help

The federal government will play an important role in setting policy priorities and identifying the resources necessary to meet our current and future goals. [FILL IN ANY SPECIFIC ASKS HERE].

### Our Contact Information

Insert YOUR contact information here, including websites, phone numbers, and e-mail.

## N. Questions to Research Personal Stories



Housing agency residents, employees, and case managers may be able to identify individuals and families who have a great success story to share.

Here are some questions/ideas to help you develop personal stories associated with your housing agency.

Why did you become an advocate?

How do the issues you are discussing impact you directly?

- Do they cost you money?
- Do they impact your health or the health of loved ones?
- Do they conflict with your organization's core mission?
- Do they impact your ability to do your job?

Do you have clients/customers/friends/colleagues that offer a compelling story?

- Have they benefited from your services?
- Have they contributed to your cause?
- Have they joined your campaign because of their own strong views?
- How do these people and others connect to the congressman's district?

Do you have residents that offer a compelling story? Questions you might ask include:

- When did you begin living in public housing? Where did you live before that? How did you feel when you got into public housing?
- What programs did you participate in while living in public housing? How did they contribute to your success?
- Describe the community you lived in while in public housing. Can you share any positive anecdotes about the community support you experienced?
- How does it make you feel when you hear people criticize those living in public housing? What would you like to say about public housing to correct the record?
- How did public housing help you become the successful person you are today?

### Tips

- Locally relevant content is beneficial.
- Highlight good work based on the programs that benefit their resident population and therefore the greater community (e.g., educational support, self-sufficiency programs).
- Leverage relationships with local decision makers and nonprofits who work on issues.
- Consider vetting the storyteller and the story and obtaining approval for use.
- Focus on unexpected, relatable, or personal situations leading to public housing as a solution.
- Expand diversity of your stories, looking for content from untapped social groups.



## O. Storyteller Information Form

Please answer the questions below to the best of your ability, and feel free to attach additional sheets of paper if you need more space.



### Questions for employees/executives in public housing:

What is your position, and how long have you been in that role?

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Why do you choose to work in the public housing industry?

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What inspires you to continue working in the public housing industry?

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What are some misperceptions regarding public housing in your community?

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What are some successes that you are proud of relating to your work within the public housing industry? What programs does your housing agency manage that lead residents to success?

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What are some challenges you face in your position?

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If you had to define the spirit of the people living in the public housing agency within your community with five adjectives, what would those adjectives be?

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Who in your community do you consider to be influential toward public housing?

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Which organizations do you consider allies to public housing in your community?

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Which non-profit organizations have a positive impact on public housing in your community?

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**Guideline for Executive/Case Manager to help collecting success stories of residents**

We hope to gather stories about and/or from individuals of different demographics, backgrounds, physical and mental conditions, and ages, with the common element being a strong connection to public housing.

We are specifically looking for stories of success (e.g., single mom close to achieving a college degree; a war veteran who organized his/her community to send greeting cards to troops abroad; high school seniors in the community who graduated the previous year), or powerful stories of hurdles overcome (e.g., a failing local business kept afloat through community support; community was able to plant trees and developed a park in empty, degraded lot).

Thinking of residents within your public housing community, please provide two to three specific examples of stories that you think may fit. As you consider relevant examples, please keep in mind that we will need to contact this individual for additional information to supplement their story and to collect a photo and a signed media release form.

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**Questions for residents/past resident storytellers:**

When did you begin living in public housing? Where did you live before that? How did you feel when you got into public housing?

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What programs did you participate in while living in public housing? How did they contribute to your success?

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Describe the community you lived in while in public housing. Can you share any positive anecdotes about the community support you experienced?

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How does it make you feel when you hear people criticize those living in public housing? What would you like to say about public housing to correct the record?

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How did public housing help you become the successful person you are today?

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## P. Preparing a Message Worksheet

| Message                |  |
|------------------------|--|
| <b>Your Challenge</b>  |  |
| <b>Message Formula</b> | <p>Sample Message Formula:</p> <ul style="list-style-type: none"> <li>• Hello, my name is [ ] and I'm from [ ] (establishes relevancy)</li> <li>• I am here to talk to you about [policy/relationship ask]</li> <li>• Knowing of your interest in [what policy issues is the person you're talking to interested in?] we think you'll be interested as well</li> <li>• This is important to the people I represent because [personal story]</li> <li>• That's why we really hope you'll [ask]</li> <li>• I'd like to follow-up by [follow-up ideas]</li> <li>• Can I get contact information for all the appropriate people in your office?</li> </ul> |
| <b>Your Message</b>    |  |

## Q. Planning a Site Visit Worksheet

*Take a few minutes to sketch out some ideas*



**What Will You Show?** How does what you're showing them relate to policy issues? (e.g., your waiting list, new services you are providing or projects funded by community development block grants).

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**Who will you invite?**

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**What is your timeline for issuing the invitation?**

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**Who will you write to and how will you follow up?**

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**Are there logistical issues you need to deal with? If so, what?**

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**Who will help you make the case?**

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**What are your plans for recording the event?**

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## R. Setting up a Site Visit Worksheet

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### Step One: Decide who to invite and invite them

- ☐ Develop an invitation letter for your member of Congress or a staff person.
- ☐ Find the district office phone number for your members of Congress (at House.gov or Senate.gov). If multiple offices, choose the one closest to where you will hold the visit.
- ☐ For invitations for MEMBERS ONLY: Call the office and ask for the district scheduler. Tell him/her you would like to send an invitation and ask the best way to send it (some offices prefer fax, others e-mail).
- ☐ For invitations for DISTRICT STAFF: Call the district office and ask for the staff person who handles housing issues. Speak with them directly and follow-up with an e-mailed invitation, if necessary.
- ☐ For invitations for Washington, DC STAFF (who often visit the Congressional district or state during the district work periods): Call the Washington, DC office and ask for the staff person who handles housing issues. Speak with them directly and follow up with an e-mailed invitation, if necessary.
- ☐ Follow up on all invitations with additional phone calls/e-mails until visit is scheduled.

### Step Two: Conduct the Visit

- ☐ Coordinate with internal staff the day before the visit.
- ☐ Prepare a one-page document telling your housing agency's story being sure to include basic facts such as mission, funding, local programs and services, and partnerships.
- ☐ Review the plan to ensure all timeframes are reasonable and develop contingency plans (if necessary).
- ☐ Have back-up plans in case of bad weather, transportation breakdowns, or other snafus.
- ☐ Assign an internal staff person the task of taking pictures during the visit as well as take notes about what the congressperson or staff person expressed the most interest in.

### Step Three: Follow Up

- ☐ Send a 'Thank You' letter to the member of Congress.
- ☐ Send pictures from the visit to the member of Congress (or better yet, post through social media).
- ☐ Follow up on any questions raised with additional information.
- ☐ Follow up on any media inquiries (after working with the member of Congress' office)
- ☐ Consider asking the congressperson to submit a statement for the *Congressional Record* about the visit.

## S. Invitation to Legislator Sample Letter

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[Date]

The Honorable [Full Name of Representative Here]

Address

Washington, DC [Zip code]

Dear Representative/Senator [Last Name]:

As a representative of housing interests in your district, I write today to invite you to visit [name of housing agency], which is located in [City, State]. Specifically, we hope that you might be available [the week of/specific date] for a brief [tour/meeting with employees]. By way of background, our housing serves [information on number of citizens] in the community. Our Mission is to [fill in mission here, if applicable].

We are eager to show you our work in [community development, serving low-income, reducing poverty, creating jobs, etc.] for our area. In particular, we would like to [fill in details of visit here – i.e., ‘show such-and-such program’ or ‘have you join us for a resident meeting’].

As you know, the federal government is an important partner in our efforts to provide quality programs and services to our community. [Fill in here on any specific benefits you’ve been able to provide with the assistance of federal funds].

Upcoming debates in Congress on housing funding and policy issues will have a dramatic impact on our community. We would welcome the opportunity to discuss these potential impacts further – and provide needed background and resources for your office on these important issues.

Thank you in advance for your consideration. To set up a visit, or if you have any questions, please contact [contact information].

Sincerely,

## T. Developing Visit Agenda Worksheet

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### SAMPLE VISIT PLAN

1.5 hour visit

| Time                | Task   |
|---------------------|--|
| 10:00 am - 10:15 am | Greet congressperson/staff at front office   |
| 10:15 am – 10:45 am | Tour of one specific housing-funded program or project that represents the local/federal-partnership (usually something funded at least in part through a federal housing program) |
| 10:45 am – 11:15 am | Meeting in conference room with employees for informal remarks and Q and A (with snacks!)  |
| 11:15 am – 11:30 am | Wrap-up/final questions and comments from congressperson   |



## U. Writing a Constituent Letter Worksheet

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### First Paragraph

*Demonstrate your relevance to those the policymaker represents*

Identify yourself as someone who either is a constituent or who provides services to the legislator's constituents.

- ☐ Identify the reason for writing and the issue(s) you wish to address.
- ☐ Highlight any relevant expertise you have on public housing issues.
- ☐ Include information about services (i.e., size, services provided, length of waiting list, Mission).

### Second Paragraph

*Demonstrate your positive approach and make the policy issue real for the official*

- ☐ State your views on the issue in your own words.
- ☐ Include a statement about the impact that specific public housing policies, such as funding or regulatory reform, have on your work.

### Third Paragraph

*Outline specific issue you want to discuss, the specific thing you are asking for, and the specific action an official can take to help you achieve your goal.*

- ☐ Clearly state what you would like the official to do.

### Closing Paragraph

*Summarize the message. Thank the official for his or her attention to this matter and offer to be available for any questions.*

## V. Constituent Sample Letter

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Our organization, *[fill in name]* represents *[fill in with a number or other quantifiable description]* of your constituents. Knowing of your interest in *[fill in the blank with something that you know about the policymaker, such as policy issues he or she is passionate about or legislation he or she has introduced]*, we would like to talk to you about our ideas on *[fill in with a specific description of your policy issues]*.

We would like to provide the following benefits to them: *[fill in with the positive outcomes of your proposed policy]*. To do so, we are seeking *[fill in with your 'ask']*.

We believe this is important because *[fill in with your personal story]*.

We hope that you will be a partner with us in providing *[list benefits]* to the residents of *[list community/constituent area]* by *[specific target]*. Thank you for your attention to this matter. You may contact *[provide contact information]* to answer any questions you may have and to further explore our request.

## **W. Drafting a *Congressional Record* Statement Worksheet**

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*Sketch out ideas for your own statement*

Event/Organization/Person

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Connection to district

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Did the Congressional office help in anyway?

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Who will be responsible for drafting the statement, submitting it to the Congressional office, and following up?

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## X. Media Sample Letter

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Hello XX,

Did you know that according to the *ReThink Survey: Perceptions of Public Housing 2013*, the majority of Americans (83%) believe that all US citizens deserve a safe and decent place to live? Yet 63% of Americans surveyed do not support public housing in their own neighborhoods.

As a member of the media, you are well aware that everyone has a certain perception of what public housing means for their communities. Today, I want to challenge that.

*ReThink*, a public awareness initiative, is asking Americans to take a moment to consider the people and families in your own communities who could be served by public housing. I work at the [name of housing agency] in [city] and would love to talk to you about this new initiative.

Here is an example of a positive story from a local housing agency – *[Feel free to include your specific stories here or use existing stories that ReThink has published on their website. Just make sure to delete this example if you include your own]* Jessica, a resident of public housing in San Antonio, is able to afford physical therapy school while working full-time and raising her daughter. She is so thankful for the resources the San Antonio Housing Authority (Texas) has provided her, so she can be a great mother to her daughter. I hope you'll take a moment to watch this touching [video](#) of Jessica, and then share with your readers how living in public housing has helped her succeed.

I encourage you to visit [www.ReThinkHousing.org](http://www.ReThinkHousing.org) to learn more. I am also available to speak with you more on the phone if you're interested in interviewing one of our residents and seeing the benefits that the [name of housing agency] in [city] offers to the community. I'd love to work with you to ask your readers of [outlet] to *ReThink* their perceptions of public housing.

Thanks so much for your time,  
*Your name and title*

## Y. Press Release Sample

### Jewel Asks Americans ‘Why Housing Matters’ to Inspire a New Song and Raise Awareness for the Benefits of Public Housing

SOURCE ReThink

#### ReThink: Why Housing Matters Initiative Launches Contest to Underscore the Importance of Public Housing For Individuals, Families, and Communities Nationwide

CHESHIRE, Conn., April 22, 2014 /PRNewswire/ -- Public housing provides homes and services for approximately 2.2 million people in the US; however, the need is much greater than that. Given current economic and federal budget conditions, public housing availability continues to decrease, while the need for it continues to grow.

Today, ReThink Ambassador and four-time Grammy Award nominated singer-songwriter Jewel invites Americans to take a minute to think about their home and share why housing matters to them. Jewel will be writing a new song about ‘Why Housing Matters’ to raise awareness of the benefits of public housing and to encourage Americans to *rethink* their perceptions of public housing.

Now through Wednesday, May 14, Americans are encouraged to go to [www.ReThinkHousing.org](http://www.ReThinkHousing.org) and submit a short essay and optional photo describing why home matters to them. Soon after, Americans will have the chance to cast a vote for their favorite entry at [www.ReThinkHousing.org](http://www.ReThinkHousing.org). The top 10 entries will serve as inspiration to Jewel as she creates a new song about ‘Why Housing Matters.’ The person with the winning entry will meet Jewel in Los Angeles and attend an exclusive performance of the song they inspired her to write.

Once homeless, Jewel understands the importance of having a stable place to live. She remembers what it was like to not have a roof over her head or not know where her next meal was coming from. As ReThink Ambassador for the second year, Jewel will continue to spread news about the initiative through media appearances in the coming weeks and launch the new song about housing later this year.

‘I’m so honored to have the opportunity to continue to work with ReThink to raise awareness for people who may not have a stable place to live. ReThink is an important initiative that inspires people to think differently about the importance of home. I’m truly looking forward to gathering perspectives and inspiration about what your home means to you, and turning it into a song that I hope will help shed light on this important cause,’ says Jewel.

“There are simple things in life we take for granted, like having a safe and stable place to live, and some people don’t realize that public housing offers more than a roof over someone’s head. Public housing is a home, it builds community, and it provides services to people like you and me,” says Courtney Rice, Corporate Communications and Branding Manager at Housing Authority Insurance, Inc. “Jewel has been an incredible partner and advocate in sharing stories from her past. Now, we’re thankful to have her use her songwriting talent and voice to help connect with Americans on the importance of having a home.”

[ReThink: Why Housing Matters](http://www.ReThinkHousing.org) is an initiative challenging the sometimes negative perceptions Americans have about public housing by sharing stories of success made possible through public housing. Visit [www.ReThinkHousing.org](http://www.ReThinkHousing.org) to hear Jewel’s perspective and experience inspirational stories of public housing – and *rethink* its impact on individuals, families, and your own community.

ReThink can be found on Facebook at [Facebook.com/ReThinkHousing](https://www.facebook.com/ReThinkHousing), Twitter [@ReThinkTweets](https://twitter.com/ReThinkTweets), Instagram [@rethinkhousing](https://www.instagram.com/rethinkhousing), and on YouTube at [YouTube.com/ReThinkHousing](https://www.youtube.com/ReThinkHousing).

For more details on the *ReThink ‘Why Housing Matters’ Song Contest*, including official rules and details, please visit [www.ReThinkHousing.org](http://www.ReThinkHousing.org) and [Facebook.com/ReThinkHousing](https://www.facebook.com/ReThinkHousing).

#### About ReThink

The ReThink initiative was developed by Housing Authority Insurance, Inc. (HAI, Inc.) with the support of its trade partners in the public housing industry. HAI, Inc. is a part of HAI Group, which is a family of companies that serves the public and affordable housing community with special, niche insurance programs as well as other value-added products and services such as training and software solutions. HAI Group and its trade partners believe in supporting ReThink to further the mission and purpose of public housing to provide housing and services to millions of Americans who might otherwise be homeless.

#### Housing Authority Insurance, Inc.

Housing Authority Insurance, Inc. (HAI, Inc.) sponsors programs for its Membership, including insurance and risk management programs, scholarship and internship programs, and charitable activities. HAI, Inc. advocates for and supports legislative and regulatory issues that help to improve the public and affordable housing industries. HAI, Inc. is a nonprofit association incorporated in 1987.

## Z. Assess Your Progress

Use these questions to review and assess your progress:



- ☐ **Review Goals** - Is my goal 'SMART' enough? Is it specific and measurable? Is it still attainable? Any changes in political environment? Is it realistic in terms of resources available? Has the timeframe changed?
- ☐ **Review Advocacy Team** - Do I have the right people on my team performing the right functions? Do they all understand their roles? Do I need to fill any gaps due to departures?
- ☐ **Review Coalition** - Are my coalition partners serving their purpose? Are they resonating well with policymakers? Are there other new groups I can approach?
- ☐ **Re-Examine Audience** - Do I know enough about my audience? Have the players changed? Any new supporter or opponent?
- ☐ **Review Messages** - Are messages personal enough? Are we telling the right stories? Any new stories?
- ☐ **Examine Facts and Data** - Do we need to update our facts and data? Are our brochures catching attention? Are our materials consistent? Are they appropriate for our audience?
- ☐ **Review Materials** - Do our advocacy materials require any updates?
- ☐ **Review Your 'Ask'** - Do I have an adequate 'ask'? Is it receiving a positive response?
- ☐ **Examine Campaign Activities** - Have I asked my audience to:
  - Speak at an event
  - Make a public statement
  - Conduct a town hall meeting
  - Submit a newsletter
- ☐ **Assess Resources and Training Needs** - Do others have the resources they need to:
  - Write effective e-mails
  - Make effective phone calls
  - Coordinate and conduct an effective meeting or site visit
  - Engage the right media for the right message at the right time
  - Capture feedback from advocates

### TIPS

Remember to capture and celebrate successes – no matter how small  
Be sure to thank your Advocacy Team and coalition members for their support



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