

LEADER
SALTA

FACILITATOR'S
GUIDE

ADVOCACY



SESSION OVERVIEW

SESSION DESCRIPTION: Advocacy is the process of influencing public policy and the distribution of public resources. For EHC the purpose of advocacy is to influence policy makers to take actions to protect public health and the environment. EHC is proactive in developing public policy solutions, participating in setting the agenda and framing the issue. Solutions are based on our beliefs and values and are developed through the Process for Action. EHC Leaders have specific advocacy responsibilities, authority, and personal characteristics that help them become strong advocates.

CORE CONCEPTS:

1. **Definition of Advocacy:** Advocacy is the process of influencing policy decisions to win justice
2. **EHC Advocates:** demand government intervention to protect human and environmental rights, and hold others accountable for their actions.
3. **Community-Driven Land Use Planning:** builds community power, ensures healthy neighborhoods, maintains and creates affordable housing, preserves community character and culture, and promotes sustainable communities.

KEY DEFINITIONS/TERMS

Advocacy: The process of influencing public policy and the distribution of public resources. For EHC the purpose of advocacy is to influence policy makers to take actions to protect public health and the environment.

Community-Driven Land Use: Process guided by residents to create and guide their community infrastructure, open space, housing and commercial needs.

EHC VICTORY(IES)

FEATURED:

Barrio Logan Community Plan Update

ICON LEGEND



Show Slide

Marks which powerpoint slide corresponds to the curriculum



Post/Document

Denotes when something should be posted or a discussion should be documented and posted



Allotted Time

Shows how much time is allotted for each section in minutes



Tools

Lists the materials needed for a particular section



Activity

Shows when something is used for an activity

Agenda

Section	Time
1. Review and Introduction to Session	15 minutes
2. Government for the People	55 minutes
3. Advocacy – One of EHC's Core Strategies	20 minutes
4. Building Blocks of Advocacy	50 minutes
5. Evaluation	10 minutes
Total Time	150 Minutes (2-1/2 Hours)

Advocacy Session Toolbox

Click here for easy-to-reproduce handouts, activity materials, power points, and other documents for this SALTA session.

Advocacy Session PowerPoint Presentation



Government for the People Game



Build-a-Leader



Large Maps of Electoral Districts



NOTEBOOK MATERIALS

Know your Elected Officials Worksheet

Building Blocks of Advocacy Worksheet

Guide to Delivering Testimony Worksheet

EHC Expanded Leader Definition

Comic Book Evaluation

Session Evaluation

SESSION CHECKLIST

Staffing needs:

- ☐ Facilitator
- ☐ Scribe
- ☐ EHC advocate, organizer or leader to present Barrio Logan Community Plan Update process

Pre-Session Preparation:

- ☐ Large Print outs of Electoral Districts:
 - ☐ State Senate (San Diego County only)
 - ☐ State Assembly (San Diego County only)
 - ☐ County Supervisors
 - ☐ City of San Diego Council Districts
 - ☐ City of National City (no separate Council Districts)
 - ☐ Tijuana
- ☐ Obtain/print out photos of all of the current elected officials, captioned with name, title, and district.
- ☐ Build-A-Leader Components

Equipment/other needs:

- ☐ LCD projector
- ☐ Laptop computer

RELATIONSHIP TO PRIOR SESSION(S)

Mission Statement – We organize and **advocate** to protect public health and the environment threatened by toxic pollution.

Goals – **(Government)**: To demand government intervention to protect human and environmental rights; **(Corporate accountability)**: To establish mandates that corporations are accountable for their actions that affect the public

(Allies): To work cooperatively to build effective local, state, national and international social justice alliances

Social Change for Justice – Advocacy is one of EHC's 3 main strategies

Leadership Definition – From characteristics, responsibilities, and authority – a few of the more important ones

- Publicly identifies as an EHC leader
- Is recognized as a leader in the community
- Earns the trust of the people
- Understands the power of working in groups
- Is willing to engage in conflict and can deal with conflict in a constructive manner
- Is able to synthesize diverse ideas
- Can develop and implement a strategic plan
- Contributes ideas, understands problems and identifies solutions
- Knows how to build power
- Knows the political playing field
- Develops a tolerance for the opposition
- Understands the opposing perspective and knows both how and when to counter certain arguments and yield to others
- Knows how to take control of a situation
- Must be able to stand alone to represent an unpopular position
- Understands the balance between personal and organizational perspectives
- Testifies at public hearings and meetings
- Lobbies government officials to take specific action
- Develops and attends skill building, issue and other trainings

Power = Resources + Actions; **Actions** = Organizing + Advocacy

1 Review & Introduction to Session

Time Allowed: 15 minutes

Participant Objectives:

1. Understand how advocacy relates to characteristics, responsibilities and authority of an EHC Leader.
2. Learn any fears or thoughts associated with advocacy.



Tools:

- PowerPoint Slides 1-4
- EHC Expanded Leader Definition
- Build-a-Leader Components



HOUSEKEEPING

- a. When participants arrive have them collect their nametag.
- b. **Vote on best comic:** when participants arrive have them lay out their finished comic with their name written on the back. During dinner each participant will vote on the one they feel best represents the previous session.
- c. Post daily core concepts



WELCOME

- a. **Clarify/answer concerns or questions.** Ask participants if they have any questions/comments concerning the prior sessions. Ask other participants to help answer/clarify the questions.
- b. **Mission Statement:** We organize and **advocate** to protect the public health and the environment threatened by toxic pollution.
- c. **Social Change for Justice Model: Advocacy** is one of EHC's main strategies
- d. **Leader description:** Ask participants to look at the updated EHC Leader definition in their notebook. Many of the characteristics that make a person a good organizer also help them be a good advocate, but there are additional ones. Point out several of the more important and place Build-a-Leader components on the poster.
 1. Knows the political playing field
 2. Testifies at public hearings and meetings
 3. Lobbies government officials to take specific action
 4. Is willing to engage in conflict and can deal with conflict in a constructive manner



Icebreaker

1. Hand out slips of paper to each participant. Let them know we will be talking about advocacy today and to write legibly on a piece of paper what is the first thing that comes to their mind when they hear the words **advocacy, advocate, lobbying**.
2. Everyone crumples their paper into a ball and gets in a circle. On the count of three everyone throws their paper to someone across the circle, picks up a different paper and throws it again. Once they are mixed up everyone opens a slip of paper and each person reads it aloud. This will begin to allow people to open up about any fears, thoughts or ideas they have about advocacy.

Summary of Discussion: You are the best advocate for your neighborhood because you know it best. Throughout the advocacy process, you will have an opportunity to practice some advocacy skills that you will learn and improve upon today!

2 Government for the People!

Time Allowed: 55 minutes

Participant Objectives:

1. Be better able to participate in developing policy solutions through understanding the roles of decision makers of the local government
2. Learn some basic functions of local government
3. Learn who represents them in all levels of government



Tools:

- Government for the People Game
- Series of maps –California (State Assembly and Senate Districts, Federal Congressional Districts), San Diego County, Cities of San Diego, National City
- Photos of Elected/Appointed Officials with names and districts written as captions
- Know Your Elected Officials Worksheet



DISCUSS PEOPLE'S RIGHTS AND GOVERNMENT

- a. Ask Participants: You have rights, what are some of them?
- b. Who gives you those rights?
- c. Who guarantees them if someone doesn't follow the rules? Let's say you had a problem in your community - do you think it matters who you talk to about it? Who would you complain to? If you don't talk to the correct people then nothing will happen. We talked about this in the Power section – who has the power to make things happen in the government? It's important to know where your rights come from as well as who can enforce those rights for you. **Possible answers:** laws give me my rights, police enforce laws, judges, complain to the city council etc.
- d. Our US Government structure is set up as a system of checks and balances. Each branch of government is not 100% in control and they monitor one another. The basic structure of our Federal Government is carried over into our State, Local and even Mexican Governments. What are the three branches called? What are they responsible for? Have volunteers stand representing each branch of the government, for both the US and Mexico sections.



There are **three main levels of government:** Federal, State and Local (local includes the County, the Cities in the County, various school districts and other special districts). We are going to focus on the local government and local policy makers in this next activity.

"Survey Says" Activity

(to be played similar to Family Feud Game Show):

1. Divide group into 2-4 teams of 5 participants each.
2. Choose one category of local government and read the description about what that agency is and does.
3. When a local government office is mentioned, participants will have 1 minute to discuss and come up with the top three reasons why someone would contact that entity.
4. After one minute, each team will read their answers and be given points for those that are correct. If they guess one or more of the top three they will receive 5 points for each answer, if they answer correctly but not in the top 3 they will receive 1 point for each correct answer. Incorrect answers receive no points.
5. Participants should understand that there are different entities for each type of complaint, suggestion etc. and in order to be effective advocates, they must approach the correct one.



GOVERNMENT – KNOW YOUR PEOPLE IN GOVERNMENT

Place district maps for U.S. Congressional Districts in San Diego County, State Senate and Assembly Districts in San Diego County, County Supervisor Districts and City of San Diego Council Districts on walls, with pictures and names of elected officials. A map of National City has pictures of the Mayor and Councilmembers. Pictures of the President, Vice President, and California U.S. Senators are also posted although these names are pre-filled on the Elected Officials Worksheet.

- a. **Identifying Your Representatives.** Distribute worksheet to participants. Participants are to go to all of the maps to identify their representatives and write their names on the worksheet. (State: Assembly, Senate, Congressional and Board of Equalization Districts; County: County Supervisorial Districts; City of San Diego: Council Districts)
 - Worksheet contains web sites for each Level of Government – most have Spanish language sections
- b. **Importance of knowing your Representatives:** These government bodies and individuals are frequently the Decision Makers on the Power Analysis.

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Advocacy: One of EHC's Core Strategies

Time Allowed: 20 minutes

Participant Objective:

1. To define the role of advocacy in EHC's work



Tools:

- PowerPoint Slide 7
- Guide to Delivering Testimony Worksheet



DEFINE ADVOCATE

An advocate is someone who speaks on behalf of others. Examples include an attorney – s/he speaks on behalf of a person or group of people in legal matters; patient advocate – speaks on behalf of a patient to doctors, hospitals, care providers (a patient advocate is often a family member); consumer advocate – speaks on behalf of all consumers to protect them from fraudulent practices or harmful products. The advocate is trying to protect the rights of the individual or group.

a. Ask participants:

1. To whom are they speaking? **Possible response:** communities, families, children, workers, environment/mother nature
2. Who are they speaking to? **Possible response:** decision makers, allies
3. What right or rights are they trying to protect? **Possible responses:** right to live, work & play in a safe, clean and healthy environment
4. Why does the community need advocates? **Possible responses:** advocate knows the rules, the players, the laws; can present a coherent argument; officials often don't advocate for poor communities and may make compromises to advance their own goals.



DEFINE ADVOCACY

Advocacy is the process of influencing public policy and the distribution of public resources (i.e. money for parks, green energy, affordable housing, public transportation etc.) For EHC, it is the process of influencing policy makers to take actions to protect public health and the environment and convey the importance of public voice in public policy.



PUBLIC POLICY SOLUTIONS

EHC is proactive in developing public policy solutions, participating in setting the agenda and framing the issue. Part of the Analyze phase of the Process for Action is setting goals and objectives: what's the injustice, what's the policy change we want to see? Helping to come up with solutions is an important responsibility of EHC Leaders. They bring knowledge of community – what they want, what will work. EHC Leaders must engage in process of setting the goal, not just help once the goal is set. They have to own the goal.



INFLUENCING DECISION MAKERS

- a. Ask participants **what influences decision makers?** *Possible responses:* money, public opinion, their own beliefs and values
- b. Discuss **what power EHC has** in each of these areas
 1. **Money** – EHC can't give money to decision makers, but we may be able to influence people who can; EHC can use its money for research, trainings, presentation materials etc.
 2. **Values** – decision makers have values. Part of advocacy is finding out what their values are and seeing how they align with EHC values. There are stated values (what a decision maker might have said in an election platform) and performance values (what their past actions reveal). Advocacy holds decision makers accountable to their values.
 3. **Public opinion** – most decision makers are sensitive to public opinion. If they are not elected officials, they were appointed by elected officials. Making decision makers know about public opinion is the keystone of advocacy.
- c. Have participants pair with a neighbor to talk about the differences between an organizer and an advocate.
- d. Ask participants what are some ways to let decision makers know about public opinion – each pair think of as many as they can. Regroup and solicit several answers and then review some of the commonly used advocacy tactics. Participants' notebooks have further descriptions and tools.
 - **Testifying at public hearings** (this can start small – asking for an official discussion at the next meeting – and end at the final public hearing where the decision will be made.)
 - **Sending letters, making phone calls**
 - **Inviting decision makers to community meetings/forums** (community organizing can become advocacy – community members can testify, make presentations, present community based research)
 - **Personal meetings** with decision makers or their staff
 - **Media campaigns** (letters to the editor, advertisements, press conferences, feature stories)
 - **Submitting post cards or petitions** in support of EHC position (gathering signatures is community organizing, presenting them to decision makers becomes advocacy)

PROCESS FOR DECIDING WHAT ADVOCACY POSITION EHC WILL TAKE/ROLE OF EHC LEADERS

As representatives of EHC, EHC Leaders may be asked if EHC will support or oppose something. EHC wants to support its allies when possible, because we may be asking for their support. But, the request still needs to be brought back to the Community Action Team and go through the Process for Action to determine if it's consistent with our mission and goals, and if we have the resources to get involved. Lack of resources is often why a request may be denied. Also, depending on the request, approval of the Board of Directors may be required.

4 Building Blocks of Advocacy

Time Allowed: 50

Participant Objectives:

1. Learn relationship of organizing and advocacy
2. Explore why advocacy is important
3. Learn characteristics of an effective advocate



Tools:

- PowerPoint Slides 8-24
- Building Blocks of Advocacy Worksheet
- Presenter for Barrio Logan Story

WHY IS ADVOCACY IMPORTANT?



Solicit answers from the group – write down what they come up with.



Possible Answers: Building Relationships, Public Speaking – Speak to persuade, Networking – information sharing and collecting—asking “who else do you know who would be interested in this or have information about this”, meeting with officials

ORGANIZING IS ABOUT BUILDING RELATIONSHIPS, SO IS ADVOCACY

The same steps should be taken in advocacy as were taken during organizing

- a. Develop your story
- b. Know your audience
- c. Meet with audience and share PSA

CHARACTERISTICS OF AN ADVOCATE

- a. Being an EHC representative and a Community Representative
- b. Respectful
- c. Be yourself, genuine – not fake
- d. Courageous
- e. Motivates and Empowers the community
- f. Celebrates community victories
- g. Sets Ego Aside
- h. Balance between respectful, diplomacy, and distant
- i. Don't take anything Personally

BUILDING BLOCKS OF ADVOCACY

The following are steps taken by advocates when working on a certain campaign or project.

The Building Blocks of Advocacy



Use boxes covered with paper with each topic printed on the side to represent each of the building blocks listed below. Have volunteers stack them on top of one another – generating definitions from the group as you go. Ask participants what they know about each block. Fill in if folks don't know what something is, or if they don't adequately define it.

- a. **Research:** The power of information is enormous. An advocate needs to support her/his position with concrete information. And, an advocate needs to be able to identify creative and realistic solutions to problems that exist in the community.
- b. **Power Analysis:** We discussed this in a previous session. This is something that we do formally when we are doing strategic planning. But, as advocates, we should always be doing power analysis in our heads. We need to always be thinking about how to move the decision-makers towards supporting our position.
- c. **Talking Points:** Preparation is a key part of advocacy. A successful advocate always carefully prepares what he or she will say in a meeting with a decision-maker, (also known as messaging) and develops the talking points in collaboration with others. There are few opportunities to directly influence a decision-maker's position, so the more prepared one is the better the outcome. An advocate needs to be ready to take full advantage of the short time with a decision-maker. And, of course, it's critical to practice your talking points before you need to use them.
- d. **Develop Strategic Plan:** No random actions. Always have a plan and only change with a good reason.
- e. **Building Alliances:** Because we are often fighting powerful industry, rich developers, or connected politicians, we need to build our power by forming alliances with other organizations. We have to be smart about figuring out common interests and common ground to bring alliances together. And, sometimes, this means that we have to engage in their issues so that they will engage in ours.
- f. **Public Speaking:** It is critical that an advocate is ready to represent the community in public. If an advocate makes a convincing argument in public, it puts more pressure on decision-makers to agree with the community. Oftentimes, public speaking might be directed at a decision-maker, but there are many others in the audience who are also listening and learning about the issue you are addressing.
- g. **Coalition Building:** An important part of advocacy is working with other organizations to combine power and identify opportunities for collaboration.
- h. **Writing Letters:** One way that we communicate an advocacy message is by writing a position letter. Either from EHC, from a coalition, or from members of the community.
- i. **Meeting Preparation:** Part of meeting preparation is creating and practicing talking points. But it is also understanding who you will be speaking with, and developing a strategy for getting through to that person.
- j. **Networking:** "It's not what you know, it's who you know." Perhaps the most important aspect of successful advocacy is meeting people and organizations and figuring out how to work towards common goals.
- k. **Meetings with Decision-makers:** A lot of advocacy happens in small personal meetings with decision-makers, when there is an opportunity for a back-and-forth discussion, and for a deeper exploration of the issue. You are more important and influential than you know! You can really move a decision maker with your presence and your convictions.
- l. **Community Meetings:** We are often able to combine organizing and advocacy most effectively by inviting decision-makers to a meeting in the community where a large portion of the community can attend and participate.
- m. **Lobbying Calls:** Finally, a lot of times we advocate by calling up decision-makers and having a short conversation, or simply telling them what our position is. When you make the calls you are an advocate. When you ask others to make the calls you are an organizer. When you do both, you are the most POWERFUL!!!

**SIDE NOTE TO FACILITATOR:**

*PowerPoint slides 10-24
available as necessary
for explanation of each
concept.*

COMMUNITY-DRIVEN LAND USE IN ACTION PRESENTATION

A Barrio Logan Organizer/ Advocate/Leader will give a presentation describing the Land Use Planning process they went through, highlighting the advocacy role. Next week participants will work on a simulated community plan and present their solutions as if they were presenting to a city councilmember. They should pay attention to the following presentation for ideas they might incorporate and see which building blocks of advocacy they can identify.

- a. Problem identification/PFA/Power Analysis (including power of Mayor)
- b. Leadership development/CAT
- c. Development of Principles
- d. Development of Vision
- e. Gaining support for Vision
- f. Presentations/advocacy to elected officials
- g. Advocating for money to start official Community Plan Update
- h. Development of Stakeholders Group & elements to be considered
- i. Development of Preferred Plan
- j. Update for latest information

5 Evaluation

Time: 10 minutes

Participant Objectives:

1. Review and evaluate understanding of core concepts
2. Evaluate the delivery of the content, information, activities and materials



Tools:

- » Session Evaluation
- » Comic Book Evaluation Sheet
- » PowerPoint Slide 25



EVALUATION

Pass out evaluation sheets for participants to fill out.

1. Ask participants to take their time in filling out the evaluation, their input will allow us to continually improve the sessions.
2. Thank participants for taking the time to fill it out, and we may use a quote from the evaluations in the SALTA publicity.

WRITTEN REVIEW

This week's comic book has 4 squares. Participants should fill in information on the following information.

1. **Levels of government** – fill in name of city council representative or mayor
2. **Community-based land use** - one thing they would like to see in their community
3. **Advocacy** – which elected official would be best to meet with for an issue your CAT is working on?
4. **Allies** – which allies would be important to have support for your issue?



PREPARATION FOR NEXT WEEK'S SESSION

1. In the first half of the next session, participants will develop a mock community plan and present their proposal to an elected official.
2. The second portion will be a review and wrap up of all of the previous session. **Ask for 8 volunteers to share their Comic Book pages with the class next week (or the winners of the comic book contest)** – one for each session: Leadership, Environmental Justice, Environmental Health – lead poisoning; Environmental Health – air/asthma; Power; Messaging; Organizing; Advocacy. Include the comic as a Power Point slide while they make their presentation.