

January 18, 2023

LWVUS Advocacy Presents:

Introduction to Advocacy 101 Modules



Presenters



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Agenda

Housekeeping

Advocacy Modules Background

Content Overview

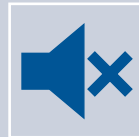
How to Use Modules

Questions

Housekeeping



All trainings will be recorded to keep accurate notes to share with attendees and others after the call.



If you are not speaking, please mute yourself to minimize sound issues.



Make sure you identify yourself (name, League, State & pronouns) when asking questions



Staff will be monitoring the chat box. If you have any questions or thoughts throughout the call, please feel free to drop them in the chat box.

Community Norms



Bring your full self and limit distractions



What is learned here, leaves here



No one knows everything, together we know a lot



Don't yuck my yum



Oops, ouch, and educate



Assume best intentions

A group of business professionals in an office setting. A woman in a dark blazer is pointing at a tablet held by another person. Other people are visible in the background, some holding coffee cups. The scene is brightly lit, suggesting a window nearby.

POLL!

Background

Background

- This is a tool to train new and existing advocates!
- Compiles new and previously shared resources
- Direct response to requests from members

Content Overview

Content Overview

- Three modules
 - Module 1: Setting Priorities
 - Module 2: Preparing to Lobby
 - Module 3: Taking Action

ADVOCACY 101 MODULES

Course for Training Advocates and Building Organizational Advocacy Capacity

Module 1: Setting Priorities

Learn to assess your League's capacity, select your advocacy priorities — including issues that fall under the campaign for Making Democracy Work® and emerging trend priorities, navigate *Impact on Issues*, and apply a diversity, equity, and inclusion (DEI) lens to your League's work.

MODULE 1

Module 2: Preparing to Lobby

There are many steps that need to be completed before advocates speak with legislative staff for a lobbying meeting. Learn about preparing the materials necessary to go into a lobbying meeting, bill tracking, and staying on top of legislative developments in your state.

MODULE 2

Module 3: Taking Action

See a comprehensive overview of the key principles and strategies involved in successful lobbying efforts, including the legislative process to building relationships with lawmakers. Learn more about the role of legislative testimony and writing effective testimony.

MODULE 3

Content Overview

1. Setting Priorities

- a) Organizational Policy Position Statements
- b) Assessing Your Advocacy Capacity
- c) Identifying Policy Priorities Across Issue Areas
- d) Applying a Diversity, Equity, and Inclusion Lens

2. Preparing to Lobby

- a) Bill Tracking
- b) Writing a Legislative Policy Memo and Leave-Behind
- c) How to Build an Advocacy Program

3. Taking Action

- a) Lobbying Best Practices
- b) Roles of Testimony
- c) Preparing Legislative Testimony



Setting Priorities

LWVUS Advocacy 101

Navigating Impact on Issues

00:00:33 / 00:37:43

Worksheet: Assessing Your League's Advocacy Capacity and Setting Priorities

This worksheet is designed to guide you through assessing your League's advocacy capacity and help you identify and define your advocacy priorities.

Brainstorming Issues and Possible Priorities

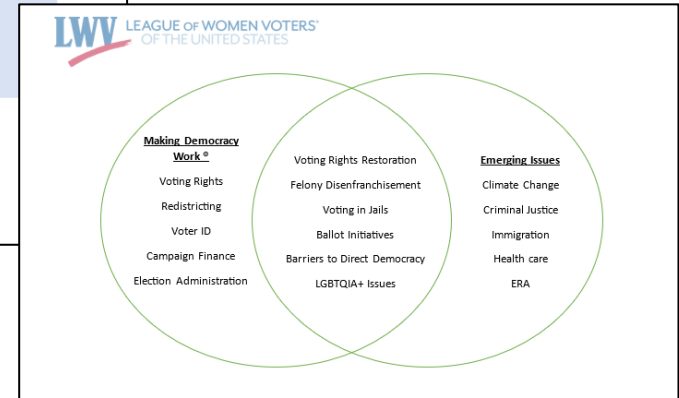
First, use the numbered lines in the table below to make a list of policy issues that are affecting your community — all of the issues that could possibly make up your priorities list for the year. These can be a combination of issues under the campaign for Making Democracy Work[®] as well as issues outside of that umbrella, like social issues.

1. example: State Voting Rights Act	10.
2.	11.
3.	12.
4.	13.
5.	14.
6.	15.
7.	16.
8.	17.
9.	18.

Then, reflect on each item by asking the following questions from *Impact on Issues*:

- Does the League have a position that supports the proposed issue?
- Is there broad member understanding and agreement on this issue?
- Does the League have a unique role to play or a chance to take the lead on this issue?
- Are other organizations or a coalition already working on the issue?
- Is this issue a good use of the League's resources (time and money)?
- Is the timing right? Is action on this issue likely in the present time frame?

Samples of module content!



Preparing to Lobby

Bill Tracking

Bill tracking is the systematic process of monitoring the progress, changes, and status of proposed legislation (bills and resolutions) as they move through legislative bodies such as state legislatures or the US Congress.

Advocacy organizations, lobbyists, and advocates use online tracking services or create in-house tools to stay informed about the status of bills in the legislative process. Comprehensive bill tracking enables advocates to engage strategically, influence outcomes, and advocate for their policy priorities as bills become law. Tracking involves identifying bills of interest, monitoring committee actions, amendments, hearings, and votes, and analyzing the potential impact of proposed legislation on specific issues or causes. It serves as a crucial tool for effective advocacy and civic participation in our democracy.

At a high level, tracking bills involves the following steps:

Identification: Translate the issues that are relevant to your organization's mission or interests into a list of bills to track — often using legislative databases, state websites, and/or advocacy platforms.

Monitoring: Continuously follow the progress of identified bills, tracking committee assignments, amendments, and scheduled hearings.

Analysis: Assess the content and potential impact of bills, considering their alignment with your advocacy goals.

Engagement: Strategically engage with policymakers by providing input during committee hearings, sharing position statements, and communicating with legislators.

Informing Supporters: Keep supporters informed about bill progress, encouraging them to take action or engage in advocacy efforts.

Samples of module content!

Demo Sheet

Search by title...

Bill	Slance	Issues	Status Text	Last Timeline Action	Source Link
1 S.B. 10 HUNTING/TRAPPING/FISHING- DISABLED VETS			Passed Original Chamber	(H) Moved Senate Bill 10 Out Of Committee	http://www.akleg.gov/basis/Bill/Detail/3/Root-HB%20%2010
2 H.B. 51 USE OF DESIGNATED REFRIGERANTS			Out of Committee	(H) Cosponsor(S) Schrage, Josephson	http://www.akleg.gov/basis/Bill/Detail/3/Root-HB%20%2051
3 H.J.R. 5 ALASKA FISHERIES, TROLL FISHERIES			Out of Committee	(H) Cosponsor(S) Mccabe	http://www.akleg.gov/basis/Bill/Detail/3/Root-HJR%20%205
4 H.J.R. 6 NAT'L PETROLEUM RESERVE IN ALASKA			Sent to Executive	(H) Legis Resolve 2	http://www.akleg.gov/basis/Bill/Detail/3/Root-HJR%20%206
5 S.B. 86 REJECT COMPENSATION COMM RECOMMENDATIONS			Passed Original Chamber	(S) Version: Senate Bill 86	http://www.akleg.gov/basis/Bill/Detail/3/Root-SB%20%2086
6 H.B. 88 WAREHOUSE WORK QUOTA INFORMATION			Introduced or Prefiled	(H) Referred To Labor &Amp; Commerce	http://www.akleg.gov/basis/Bill/Detail/3/Root-HB%20%2088
7 H.B. 86 MONEY TRANSMISSION; VIRTUAL CURRENCY			Introduced or Prefiled	(H) Referred To Labor &Amp; Commerce	http://www.akleg.gov/basis/Bill/Detail/3/Root-HB%20%2086
8 H.B. 85 PROFESSIONAL LICENSING; TEMP PERMITS			Introduced or Prefiled	(H) Referred To Labor &Amp; Commerce	http://www.akleg.gov/basis/Bill/Detail/3/Root-HB%20%2085
9 H.B. 83 CITIZEN ADVISORY COMM ON FEDERAL AREAS			Introduced or Prefiled	(H) Scheduled But Not Heard	http://www.akleg.gov/basis/Bill/Detail/3/Root-HB%20%2083
10 H.B. 87 PERM FUND; EMPLOYMENT, ELIGIBILITY			Introduced or Prefiled	(H) Referred To Labor &Amp; Commerce	http://www.akleg.gov/basis/Bill/Detail/3/Root-HB%20%2087
11 H.B. 89 DAY CARE ASSIST; CHILD CARE GRANT PROGRAM			Introduced or Prefiled	(H) Referred To Health &Amp; Social Services	http://www.akleg.gov/basis/Bill/Detail/3/Root-HB%20%2089
12 H.B. 82 SELECTION AND REVIEW OF JUDGES			Introduced or Prefiled	(H) Referred To Judiciary	http://www.akleg.gov/basis/Bill/Detail/3/Root-HB%20%2082

Preparing to Lobby

Writing a Legislative Policy Memo

A legislative or policy memo is a document that *analyzes and provides recommendations* on an issue, policy, or piece of legislation to *inform and influence* decision-makers. In the context of advocacy writing, a memo differs from a letter. The primary differences are the length, depth of the content, and size of the audience.

Letter or Memo?

While letters and memos are similar, there are some strategies to consider when deciding whether to format your advocacy communication as a letter or a memo. A letter on a policy issue is often sent to a targeted list of recipients — for example, a state's two Senators — and can be many pages long to explain the components of a bill or policy issue in depth. A memo is typically short, sent to a broad audience — like all members of the House of Representatives — and avoids getting into the weeds of specific policies. Memos and letters usually focus on one single piece of legislation, and often LWVUS will write both a memo and a letter about the same bill. As an example, it might be appropriate to write a memo to all members of Congress emphasizing the need to pass the *John R. Lewis Voting Rights Advancement Act* and a letter asking members of the committee of jurisdiction for a "yes" vote on the bill.

A memo should be:

- Clear: assume the reader is unfamiliar with the issue and avoid highly specialized language.
- Concise: assume the reader will review it briefly once. LWVUS typically aims to keep legislative policy memos under two pages long.
- Values-oriented: connect the policy issue to your organization's values to explain why you are asking legislators to take a specific action on the issue.
- Bipartisan: ideally, the message should appeal to bipartisan, widely held values to draw support for the memo's broad audience.

Samples of module content!

Creating a Legislative Policy Leave-Behind

A legislative or policy leave-behind is a document that briefs readers on a legislative or policy priority, which you leave with offices of decision-makers, partners, etc. This leave-behind may be used in addition to a general leave-behind with information about your organization that can be used in advocacy meetings about many different policy issues.



A leave-behind should be:

- Clear: assume the reader is unfamiliar with the issue and avoid highly specialized language.
- Concise: assume the reader will review it briefly once. LWVUS typically aims to keep it to one page.
- Formatted: visually appealing and clearly branded and in PDF format, so that it is not easily editable and can be circulated digitally.
- Messaging: ensure that it is consistent with League policies, not contradictory to partner messaging, and sufficiently apolitical/bipartisan to ensure it will resonate with the offices you meet with.

Taking Action

Lobbying: Best Practices for Meeting with Legislators

Meetings with Legislative Staff

Lobbying is a vital aspect of advocacy, enabling individuals and organizations to influence the legislative process and drive policy change. Lobby meetings with legislative staff play a crucial role in conveying your message, building relationships, and advancing your cause.

Setting the Stage: Schedule a meeting with the legislator's staff to discuss your concerns or propose a policy change. Be concise about your objective and request a specific amount of time- usually 15 – 30 minutes.

Preparation Is Key: Research the staff member's background, their role, and their legislator's stance on the issue. Prepare a succinct and compelling message that clearly outlines your ask.

Know Your Talking Points: Be ready to present your key talking points, including facts, data, and personal stories that support your position. Craft a persuasive narrative that resonates with their values. Consider crafting a general "elevator pitch" about the League and rehearsing it, so that you are always ready to share a brief introduction on the League's work and get your audience interested in learning more.

Building Relationships: Engage in active listening, ask questions, and express genuine interest in their perspective. Building a rapport can establish trust and lead to continued dialogue.

Tracking Interactions with Decision-makers

It is important to track your interactions with decision-makers. This will allow you to maintain a record of responsive and appropriate points of contact, any intel gleaned, ways you might work together in the future, etc. If you don't have specific software to do this, you can create and maintain a spreadsheet.

Samples of module content!

Preparing Legislative Testimony

Testimony is a powerful tool to communicate your position on an issue during legislative hearings and get your message in the public record. Testifying at a hearing is an opportunity to educate legislators and policymakers about the impact that proposed legislation might have, provide recommendations, and allow your organization to take an official position on the record. Writing effective testimony ensures your voice is heard and can influence decision-making.



Purpose:

1. Elevate/educate on an issue and share community stories with legislators, organizations, and media
2. Ensure legislators consider all possible impacts of legislation
3. Pressure and influence legislators
4. Go on the public record, laying the groundwork for future litigation
5. Stand in solidarity with marginalized communities
6. Promote your organization's advocacy work

Written Testimony Preparation:

Research the Hearing: Understand the purpose, context, and scope of the hearing. Tailor your testimony to address specific aspects of the legislation being discussed.

How to Use Modules

How to Use Modules

- Content format varies:
 - 1-pagers
 - Videos
 - Worksheets
- Can be navigated individually or administered as a group
 - Simple as sharing link with advocates
 - Or Leagues can complete materials in meetings together

Feedback

We'd love to hear from you about your experience today!

<https://survey.alchemer.com/s3/6824369/LWVUS-Post-Event-Feedback-Form>

Questions?