

WISCONSIN PUBLIC HEALTH ASSOCIATION



**LEGISLATIVE TOOLKIT
FOR THE PUBLIC HEALTH PROFESSIONAL
May 2010**

Legislative Tool Kit

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1. Executive Summary

The Wisconsin Public Health Association Legislative Kit has been created to assist our members and their organizations. The goal of the kit is to provide our membership with the necessary tools to advance public health policy, as well as to build effective relationships with legislators, state and local policy makers. Within the kit, you will find the collective wisdom of numerous WPHA colleagues and the advice of several legislators.

The materials in the kit provide WPHA members with a recipe for success when communicating with policy-makers, whether working with local boards and coalitions or at a state and national level. Input was gathered from key legislators who are involved in shaping public health policy. In addition, excerpts from the “American Public Health Association Advocates Handbook: A Guide for Effective Public Health Advocacy” have been incorporated and adapted for Wisconsin.

For those who want to become more involved in advocacy and policy development activities, we hope that you find this kit useful by providing you with practical ideas and tips. For the more seasoned colleague, the kit may provide you with some new approaches to add to your current strategies.

Public health needs to be visible in the eyes of the legislature. It is through effective communication with those whom we elect, that we are able to advance our public health causes and agendas. We hope that you find the information provided in the kit useful and we look forward to seeing you around the capitol!

A. Getting Involved

Your individual actions can and do make a difference. Who you share your public health knowledge and experience with creates a synergistic effect. It not only raises awareness of the issue, but increases the likelihood that action will be taken. Next time you are faced with a public health issue, look to influential community leaders and policy-makers as partners in the policy-making process. Engage your community leaders and policy-makers to support your advocacy activities. Think of the contributions your individual citizens, local associations and boards can make, not only on local matters, but also on regional and state issues that have a local impact.

B. What is Advocacy and Why Do It?

What is advocacy and why should individuals committed to public health be involved in advocacy? An advocate is a person who argues for a particular cause. To advocate is to act in support of a particular issue or cause. Anyone can be an advocate. As an advocate, you are exercising your right to participate in the democratic process. Being a public health advocate gives you the opportunity to influence the way the public and policy-makers think and act on public health policies.

“All politics is local.” This often repeated phrase holds true. The power of grassroots advocacy comes from individual action and groups of committed constituents joining together to provide policy-makers with the expertise they need to make decisions.

Policy-makers at all levels of government cannot know every constituent. But those constituents that make an effort to develop a relationship with and act as a resource to their elected or appointed leaders can have a real impact. By introducing your policy-makers to the work that you do, they know how public health serves their constituents. Initiating and maintaining a relationship with your policy-makers is the access point into the policy-making process. How do we know this? Just ask a policy-maker. They will tell you one of the most important parts of their job is to stay in touch with their constituents. They rely in information from individuals and organizations to help them stay informed and aware of issues of concern.

Working in a coalition with other committed individuals or organizations is also an effective way to encourage policy-makers to support a particular public health initiative. Organized groups of constituents with a common goal and a broad knowledge base about public health issues hold great influence with policy-makers.

Healthier communities are created by educating our citizens and involving our partners in public health issues. The winning policy-making equation is,

“Education + Action = Advocacy”.

C. Advocacy is a Lifelong Adventure

Most importantly, remember advocacy is a lifelong adventure, an activity that is always changing and is never boring. To guarantee a bright future for public health programs, funding, and protections, means not concentrating solely on an immediate legislative win, but also on building and advancing our public health mission. Keep in mind when you visit your policy-maker or send an e-mail about a piece of public health legislation, you are working to build a long-term relationship with that policy-maker.

Success in advocacy is not just measured by the passage or defeat of a local ordinance, a bill in a state legislature or before Congress. Success in advocacy means changing opinions and educating the public and policy-makers alike. It is also about making your policy-maker a champion of public health.

So, now that you are convinced that public health advocacy is important, how do you learn the basics of being an effective advocate? The following sections provide you with some general guidelines as you involve yourself in the public health policy arena.

2. Your Role in Public Policy

D. Public Health and Policy

Since the 1980s, the growing field of population health has broadened the focus of public health from individual behaviors and risk factors to population-level issues such as inequality, poverty, and education. Modern public health is often concerned with addressing determinants of health across a population, more so than advocating for individual behavior change.

Public Health is the science and art of preventing disease, prolonging life and promoting health through the organized efforts and informed choices of society, organizations, public and private, communities and individuals." (1920, C.E.A. Winslow)^[4] It is concerned with threats to the overall health of a community based on population health analysis.

During the 20th century, the dramatic increase in average life span is widely credited to public health achievements, such as vaccination programs and control of infectious diseases, effective safety policies such as motor-vehicle and occupational safety, improved family planning, fluoridation of drinking water, anti-smoking measures, and programs designed to decrease chronic disease.

A social gradient in health runs through society, with those that are poorest generally suffering the worst health. However even those in the *middle classes* will generally have worse health outcomes than those of a higher social stratum.

There is recognition that our health is affected by many factors including where we live, genetics, our income, our educational status and our social relationships - these are known as "social determinants of health."

The *new* public health seeks to address these health inequalities by advocating for population-based policies that improve health in an equitable manner.

Multiple strategies are needed to improve quality of life in our communities. Key among these must be strategies that emphasize policy development designed to help local communities achieve local level change.

The focus of Public Health has broadened from individual behaviors and risk factors to population-level issues.

These issues are best addressed through policies that improve health in an equitable manner.

E. Policy development

Local, state, and federal policies influence the way society organizes its resources, conducts its business, and expresses its values. In a democracy, all people have a right to participate meaningfully in policy making. The use of successful local projects to inform policy agendas acknowledges the authenticity of a community-centered approach to change.

Public health depends on successful policy development at all levels of government and in all sectors of our community.

- Acting on their knowledge about their community, professionals create data-driven policies to meet health needs and address emerging issues. They help craft sound health policies by providing expertise to local, state and federal decision makers. They also inform individuals and organizations about public health laws while monitoring and enforcing compliance.
- With local and state government agencies, businesses, schools, and the media, public health professionals (PHP's) spearhead locally organized health promotion and disease prevention campaigns and projects. They galvanize the community to tackle disease prevention and personal health care needs. PHP's also educate and encourage people to lead healthy lives

through community forums; public workshops and presentations; and public service announcements.

*APHA Executive Director
Dr. Georges Benjamin, MD, FACP: "It takes public health professionals working together to sustain a vocal and noticeable presence at all levels of policy-making to ensure that public health is protected and that public health programs are supported—fiscally and politically."*

Develop, apply and enforce policies, laws and regulations that improve health and ensure safety in an equitable manner.

Lead efforts to mobilize communities around important health issues.

In addition to policy creation, PHP's are responsible for the following:

Track and investigate health problems and hazards in the community. PHP's gather and analyze data on the community's health to determine risks and problems. This information drives specific programs and activities designed to control multiple threats: both communicable and chronic diseases; food, water, insect and other "vector-borne" outbreaks; biological, chemical and radiological hazards; and public health disasters.

Prepare for and respond to public health emergencies. As a result of extensive and ongoing preparation, PHP's respond quickly and effectively to disease outbreaks and other public health events—they are intensively trained to respond to increases in the incidence of diseases, natural disasters, and acts of terrorism. They coordinate delivery of drugs, supplies, and provisions to victims and populations at risk. They keep the public informed and serve as the network hub for community hospitals, physicians, and other health care providers.

Link people to health services. PHP's connect people with personal health services, including preventive and health promotion services, either in the community or as close to the community as possible. They also advocate for development of needed programs and services in underserved populations and continuously monitor the quality and accessibility of public health services.

Achieve excellence in public health practice through a trained workforce, evaluation, and evidence-based programs. PHP's recruit and develop skilled workers with expertise in core public health competencies. They ensure that public health workers update their knowledge and skills through continuing education, training and leadership development activities. They regularly evaluate the effectiveness of all programs and activities using evidence-based standards and strive to adapt successful interventions from other communities.

Your individual actions can and do make a difference. When you share your Public Health knowledge and experience, it creates a synergistic effect. It raises awareness of the issue and increases the potential that action will be taken. Engage your policymakers and key community leaders to support your advocacy projects. Focus on the contributions citizens, local associations and boards can make, from a local level to a national level.

Increasingly, legislative members look to the opinions and expertise of their constituents and not solely the paid professional lobbyists hired to promote the interests of a particular organization or group. This makes it all the more important that public health professionals feel comfortable sharing their knowledge and hands-on experiences with their policy-makers.

Knowing this, it is important to answer some of the key questions about the permissibility of certain activities individual advocates may undertake.

Keep in mind that the rules governing an individual's advocacy efforts can be different from the rules governing organizational advocacy and lobbying activities.

F. Defining Advocacy

WHAT IS IT? Activities designed to support a certain cause.

ADVOCATES: Anyone, when representing him or herself, can advocate an issue or idea to legislators or their staff and urge them to take certain action. This makes it all the more important that public health professionals feel comfortable sharing their knowledge and hands-on experiences with their policy-maker.

Individuals

“What can I do if I am a state or federal employee?”

This question comes up often. If you are a state or federal employee, do not automatically assume that you cannot take part in advocacy activities. As a federal or a state employee, you are subject to regulations concerning communication with state and federal legislators, and this should be taken seriously. Be sure to investigate your agency or organization’s policies and follow the rules as expressed by your state’s ethics office. That being said, the bottom line is that it is important for all employees, regardless of who your employer is, to fully investigate and become thoroughly familiar with workplace rules and guidelines so that you can successfully fulfill your role as an advocate.

You can influence your legislators and be an effective advocate for public health by following certain guidelines:

- **The First Amendment protects your right to be an advocate.** If you adhere to the regulations regarding advocacy, you *can* participate in the policy-making process and advocate public health with your legislators and their staff.
- **Be sure to identify yourself primarily as a concerned constituent presenting your personal views.** You may identify your official state or federal capacity, or other employment position, as long as you make it clear that you are speaking on behalf of *yourself* as a constituent, or for example, the local public health association or advocacy organization of which you are a member. If you are writing to express your personal views, clarify that you are in no way representing your agency or organization for whom you work or any of your workplace colleagues.
- **State or federal funds cannot be used directly or indirectly to pay for any of your advocacy activities.** This includes salary, staff, or office equipment or supplies (e.g. copier, postage, telephone, computer, fax, etc.)—even after working hours. Personal

Advocacy is participating in the democratic process by taking action in support of a particular issue or cause.

funds may be used. Be sure to use your agency or organization's letterhead only if it is appropriate or approved.

- **Advocacy activities must be conducted during personal time.** You should take annual or personal leave to cover any time spent on advocacy activities conducted during regular working hours. You can participate in advocacy activities after hours and on weekends without taking annual leave.
- **Most importantly, check your agency or organization's policies** to learn more about employee rules and guidelines for advocacy.

Organizations

WPHA and many of our state partners in public health have been granted 501(c)(3) tax-exempt status by the Internal Revenue Service. The lobbying rules that govern 501(c)(3) organizations in respect to lobbying are found in two Sections—4911 and 4912—of the Internal Revenue Code. Organizations with 501(c)(3) tax exempt status face certain legal limitations on the types of political and lobbying activities in which they can engage.

For example, 501(c) (3) organizations are **not** allowed to be involved or intervene in a political campaign—either on behalf of or in opposition to a particular candidate or policy-maker. Yet, these organizations **can** engage in lobbying activities regarding issues, legislation, and regulation subject to certain limitations. They are customarily allowed to spend 25% of the annual revenue on grassroots lobbying activities.

Terms and Definitions

“What is considered lobbying?”

To be considered lobbying, a communication must refer to and express a view on a specific legislative proposal that has been introduced before a legislative body (federal, state, or local). This means working to influence the outcome of specific legislation—trying to get a bill passed or defeated—by communicating your organization's views or position to those who participate in the formulation of the specific legislation—your Members of Congress, your state legislators, your local elected officials, or the staff of policy-makers.

“How is lobbying different from advocacy?” Advocacy is participating in the democratic process by taking action in support of a particular issue or cause. Advocacy activities like participating in a town meeting or demonstration, conducting a public forum or press activity, or developing an issue brief for your local policy-makers on a particular public health issue do not constitute lobbying *as long as you are not urging a policymaker to take a position or action on specific legislation.*

WPHA contracts with registered lobbyists who are registered with the Governmental Accountability Board, and reports the amount of funds expended on the organization's lobbying activities twice annually.

Examples

The following are some examples of action to help you better understand what is and what isn't lobbying.

- A Public Health Association prepares an issue brief on the Superfund program. As long as this issue brief presents a balanced discussion of all sides of the debate, this does not constitute lobbying—non-partisan research and analysis is not counted as lobbying. This issue brief can even be reprinted in the WPHA newsletter and it is not lobbying.
- The leadership of the Wisconsin Public Health Association goes to the state capitol to discuss public health funding issues and to provide a general overview of public health infrastructure across the state. These WPHA leaders continue to develop strong working relationships with their state policy-makers. As long as these WPHA members do not urge state legislators to vote a certain way on a particular piece of legislation. This visit is not considered lobbying.
- In contrast, if these WPHA leaders, on behalf of WPHA, communicate with state legislators to support, oppose, or modify a bill pending in the state legislature, this is lobbying.

“How much lobbying is our state public health association allowed to do?”

When your organization or association expends resources—staff and funding—on lobbying activity, you must track these expenditures for the organization's tax records and for filing your 990 form with the Internal Revenue Service. Organizations may choose to comply with one of two different standards for determining the extent of the organization's legal lobbying limits, a “no substantial part” measure or a formula measure known as a 501(h) election. Before examining the formula for lobbying expenditure limits, a key in understanding how much lobbying your association or organization can participate in is knowing that lobbying activities fall into two categories—direct and grassroots lobbying.

“What’s the difference between direct and grassroots lobbying?”

Direct lobbying happens when an organization—like WPHA—attempts to influence federal, state or local legislation by directly contacting (such as calling, writing, or visiting) any member of a legislature, legislative staff, or government official participating in the development and progress of legislation.

Grassroots lobbying happens when an organization—again, using WPHA as an example—attempts to influence federal, state or local legislation by trying to influence public opinion and get the general public to act. This can be confusing, as “grassroots” is generally used to connote the local membership of an organization; however, for IRS determination, grassroots is defined as “reaching the broader public.” Direct lobbying is also WPHA calling on the organization’s membership—in this case, WPHA members—to persuade policy-makers to propose, support, oppose, change or otherwise influence legislation.

The call to action by WPHA to members constitutes direct lobbying for the Association. The subsequent action taken by WPHA individual members (such as writing, calling, or visiting) is advocacy and is not considered lobbying because they are acting on their own behalf as public health professionals and constituents, and are not representing WPHA.

Thus, a call to action by WPHA to the broader public constitutes grassroots lobbying for the Association. The subsequent action taken by individual members of the public on their own behalf (such as writing, calling, or visiting) is advocacy and is not considered lobbying.

Examples

The following specific examples illustrate the differences between direct and grassroots lobbying.

- A WPHA Board Member, Executive Director, and staff go to a meeting with a WI Senator to discuss WPHA’s position on the statewide health implications of specific tobacco legislation pending in the Senate. This visit constitutes direct lobbying by WPHA. The costs that WPHA incurs must be counted as direct lobbying, (e.g. salaries/benefits of WPHA staff, travel expenses, and materials preparation). Remember, Board Members serve in a volunteer capacity and therefore only their travel expenses need be counted as lobbying.
- WPHA sends an issue brief to its members detailing how a pending regulatory reform bill would affect public health, presenting both sides of the argument.

- This issue brief does not constitute lobbying by WPHA because there is no “call to action”—the issue brief does not *directly* encourage its members to call or write particular policy-makers to urge them to act in a particular manner on a specific bill; nor are addresses, phone numbers, or e-mail addresses of policy-makers provided to members.
- WPHA sends an Action Alert to its members detailing how a pending regulatory reform bill would affect public health and urges WPHA members to contact their policy-makers and voice their opposition to the bill. This Action Alert constitutes direct lobbying by WPHA because there is a “call to action”—members were provided with specific encouragement to call, write, fax, e-mail, or visit their policy-makers on the pending regulatory reform legislation to urge specific action.
- WPHA places an ad in the *Milwaukee Journal Sentinel* newspaper detailing how a pending regulatory reform bill would affect public health, urging that the public oppose the bill, and identifies how Members of the WI Legislature are planning to vote on this issue. This ad constitutes grassroots lobbying by WPHA—the public was provided with specific encouragement to contact their policy-makers and urge them to oppose pending regulatory reform legislation.
- WPHA pays for a billboard ad calling on the public to support the public health provisions of pending tobacco legislation and encourage the public to write and call Members of the WI Legislature. This ad constitutes grassroots lobbying by WPHA—the public was provided with specific encouragement and contact information to communicate with their policy-makers and urge them to support legislation.

Resources

- <http://advocacy.phaii.org/index.cfm/> An excellent website with tools for advocacy/guides, etc.
- <http://info.k4health.org/pr/advocacy/index.shtml> from: Bloomberg/John Hopkins School of Public Health
- <http://tools.iscvt.org/start>
- American Public Health Association fact sheet #1.
- APHA Legislative Advocacy Handbook: A Guide for Effective Public Health Advocacy

3. Shaping Your Message

A. Creating a Message that is Worth Listening To

Have you ever found yourself asking, “*Why don’t they understand this issue?*” or “*Why can’t I get them to care about this issue?*” In many instances, it is a lack of information rather than a lack of concern. The more useful question might be, “*Have I clearly presented the facts surrounding this issue and provided sufficient background information?*”

As one former State Representative has said, “*Legislators are generalists. Due to the nature of the job they know a little about a lot but not a lot about much.*” This section is intended to assist you in shaping a message that is worth listening to.

Know the Facts

When communicating to your policy-maker about an issue, it is critical that you are prepared with the necessary background information. Prior to communicating with your policy-maker make a mental note of the following:

- How does this issue impact the policy-maker’s constituents?
- What is the impact in terms of human cost (i.e., risk for injury, disability, premature death) and business, economic cost (i.e., loss productivity, increase taxes)?

Know what you want done

When presenting the facts about an issue, you want to be prepared to provide solutions, suggestions or ideas that address the issue. Your proposed solution(s) needs to be grounded in best-practice research if possible.

In preparing to present your position, keep in mind the following:

- What is the short-term (1-2 years) and long-term impact of your proposal in terms of cost-benefit, human cost, business/economic impact and quality of life? Policy-makers are in sense hired by their constituents to get a job done within their term. Therefore, benefits to your proposed solution need to be shaped both from a short-term and long-term perspective. Former State Representative and WPHA member Mary Ann Lippert, emphasizes this point, “Talk about results, especially when asking for money. Make sure you quantify your request to some type of result, what is the money is going to buy.”

- What will happen if nothing is done? What are the risks of not doing anything?
- What other proposals have been presented? What are the strengths and limitations of those proposals?
- What have other communities done to address the issue?
- What are the pitfalls in supporting your proposal?

Use Personal Stories

Policy-makers will act if they believe in a cause. Personal stories on how the issue has affected an individual or community within the policy-makers jurisdiction can be powerful in supporting your cause. State Senator Judy Robson reinforces the power of personalizing your request. *“Telling why an issue is important to you is better than just stating your position on an issue.”* Obtain permission from the individual(s), as personally identifiable information will illustrate the point better than generalities.

Prepare your Points

Prepare a one-page summary or fact sheet that outlines the issue and your proposed solution. This sheet will assist you when you communicate with your policy-maker. Be sure to note the sources of your information. Avoid professional jargon. It may be helpful to share your points and get feedback from a person not well connected to the issue.

Know what you want done

Be Knowledgeable- Know Your Community

Personalize it

Prepare your Talking Points

B. The Process

Defining Goals

Any advocacy effort must begin with a sense of its goals. Among these goals some distinctions are important.

- What are the long-term goals and what are the short-term goals?
- What are the content goals (e.g. policy change)
- What are the process goals (e.g. building community among participants)?
- What is the impact in terms of
 - Cost/Benefit
 - Human Cost

- Business/Economic Impact
- Quality of Life

These goals need to be defined at the start, in a way that can launch an effort, draw people to it, and sustain it over time. Before creating the message, you must first know who will be receiving the message and who is communicating the message.

Define Audience

Who are the people and institutions you need to move? This includes those who have the actual formal authority to deliver the goods (i.e., legislators). This also includes those who have the capacity to influence those with formal authority (i.e., the media and key constituencies, both allied and opposed). In both cases, an effective advocacy effort requires a clear sense of who these audiences are and what access or pressure points are available to move them. Think about businesses. They have influence.

The Message

Reaching these different audiences requires crafting and framing a set of messages that will be persuasive. Although these messages must always be rooted in the same basic truth, they also need to be tailored differently to different audiences depending on what they are ready to hear. In most cases, these messages will have two basic components: an appeal to what is right and an appeal to the audience's self-interest.

Messengers

The same message has a very different impact depending on who communicates it. Who are the most credible messengers for different audiences? In some cases, these messengers are "experts" whose credibility is largely technical. In other cases, we need to engage the "authentic voices," those who can speak from personal experience. (Heart-felt stories). What do we need to do to equip these messengers, both in terms of information and to increase their comfort level as advocates?

Delivery

There are many ways to deliver an advocacy message. The most effective means vary from situation to situation. The key is to evaluate them and apply them appropriately, weaving them together in a winning mix.

Resources

An effective advocacy effort takes careful stock of the advocacy resources that are already there to be built on. This includes past advocacy work that is related, alliances already in place, staff and other people's capacity, information and political intelligence. In short, you don't start from scratch you start from building on what you have.

Gaps

After taking stock of the resources you have, the next step is to identify the resources you need that aren't there yet. This means looking at alliances that need to be built, and capacities such as outreach, media, and research, which are crucial to any effort.

First Steps

What would be an effective way to begin to move the strategy forward? What are some potential short term goals or projects that would bring the right people together symbolize the larger work ahead and create something achievable that lays the groundwork for the next step?

Evaluation

As with any long journey, the course needs to be checked along the way. Strategy needs to be evaluated by revisiting each of the questions above (i.e., are we aiming at the right audiences; are we reaching them, etc.) It is important to be able to make mid-course corrections and to discard those elements of a strategy that don't work once they are actually put into practice.

Note: A common confusion in the development of advocacy strategy is the difference between "strategy" and "tactics." **Tactics** are specific actions – circulating petitions, writing letters, staging a protest – that are the building blocks of advocacy. **Strategy** is something larger, an overall map that guides the use of these tools toward clear goals. Strategy is a hard-nosed assessment of where you are, where you want to go, and how you can get there.

(1. Adapted From Jim Shultz of the Democracy Center by The Institute for Sustainable Communities Advocacy Center)

C. YOUR MESSAGE

Developing Talking Points

Remember, first and foremost, your Legislator probably has only a general idea of any type of policy that needs to be created, or none at all. It is your role to educate them.

(Remember, education, not lobbying) So where do you start?

- What are the facts about this issue?
- What is the impact in terms of human cost, business cost, and economic cost?
- Who will win and who will lose if this policy is enacted?
- How does this issue impact the policy-maker's constituents?

- What do you know about the community?
- Know the arguments from the opposition.
- Why do they oppose it?
- What is the impact on the opposition?

Stating your position

When discussing this issue, you have to be prepared to provide suggestions, ideas, and solutions that address the issue. Make sure it is grounded in best-practice research. You need to have good data to support your position. That data can be community surveys, done by a non-biased source, data from CDC, data from proven impacts in other communities or states, etc. Look at the issue from both a short-term and long-term impact. Talk about results. What are the strengths and weaknesses or limitations of the proposal? Talk about them. Don't let the Legislator be blindsided later on, making you look non-credible.

*Make the Message
Yours*

Make it Personal

You have to personalize your message. Why is it important to you? What is your story? Facts can back you up, but it is your personal experience that reinforces the power of the issue. If you don't have your own story, find someone's story and use it—just get permission first. A personal story provides more context than facts ever will, but it is important to use both.

Prepare the Message

Now take all of the points above and put it to paper. Compose a one-page summary or bulleted fact sheet (whichever works best for you) that outlines the issue and your solution. This sheet will assist you when you meet with your legislator or policy maker or the media. Read it through until you know it back and forth. It will be helpful for you to practice the delivery and get feedback from several people—one who doesn't know the issue, and one who is familiar with it.

Resources

- <http://ctb.ku.edu>
- Jim Shultz of the Democracy Center by The Institute for Sustainable Communities Advocacy Center

4. Delivering the Message

A. Know How to Deliver the Message

You have an issue that you think needs to be shared with a policy-maker. Yet, you are concerned about the best way to approach someone who is so busy. You may ask yourself, *“Is this person even going to listen to me? How can I get my point across in a limited amount of time in a way that they will understand?”* This section outlines some considerations to keep in mind when communicating your message to your policy-maker.

B. Who Are Your Legislators and How Do You Reach Them?

The best and most current accessible information is through the Wisconsin Legislature via their website: www.legis.state.wi.us. Here you will find district maps, biographical information, committee assignments, and contact information. Please note that each Senate District will incorporate several Assembly Districts. For example, in Senate District #2 the Assembly Representatives are divided into Districts 4, 5, and 6. When contacting your Representatives, make sure you touch base with all in your district, as well as your Senator.

C. Communicating with Policy-Makers

Policy-makers are ordinary people. Be friendly, sincere and honest when you are meeting or talking with them. It is also important to try and avoid being intimidated by them.

To be effective in communicating your ideas and issues, it is important that you establish a relationship with your policy-maker. If you have not already introduced yourself to a policy-maker, take a moment to stop by their office or call them on the phone. Former State Representative and WPHA member Mary Ann Lippert reinforces the value of personal visits. *“It is important to visit with your legislators in Madison, but it is also equally important to invite them to your local agency and give them a tour or offer them an opportunity to see first hand the programs/services you provide.”* Remember that relationships are created over time through numerous interactions.

Your ultimate goal is to have policy-makers directly contact you for local input on public health related issues. Therefore, always treat your policy maker with respect, even if they have opinions that differ from yours. While they may not support you on this issue, you may find them to be your ally on issues in the future.

Another way of influencing your legislator is working with their staff. It is key to get to know aides and staff members for state and national legislators. Aides and staff members can greatly influence the development of policy as they are sources of information to legislators. Provide them with background information on the issue and proposed strategies to address the issue.

All state Representatives and Senators say “its okay to rely on staff. If you can’t see your legislator, ask to meet with a staff person. Legislative staffs are very good at understanding issues and communicating constituent views to legislators, so don’t be put off by meeting with a staff person instead of a legislator.”

Keep in mind, policy-makers respond best to people from their own districts. It is more effective to have a person from the policy-makers district communicate the message personally, or accompany you on an office visit.

Be sure to recognize your legislator’s efforts even when they do not directly involve your own priorities. Drop them a post-card, letter, or better yet, pick up the telephone and acknowledge their contribution personally.

Prior to approaching your policy-maker you want to ensure your message is clear and concise (refer to the section, “Shaping Your Message: Have a Message that is Worth Listening To). After you have gathered your thoughts, it is time to approach your policy-maker.

There are a number of methods available in communicating your public health policy message. The following section provides an overview of the various methods and points to keep in mind when selecting a method.

D. The Right Method at the Right Time

There are a number of avenues available to us when influencing and shaping public health policy. Knowing what avenue to use and when, is as critical as your message.

The key to being effective in your advocacy and policy development activities, is using the right method at the right time. In many instances, you will benefit from using more than one method to address your issue.

In regard to the timing of your message, earlier is usually better than later. The earlier you involve yourself, the better chance you will have of shaping policy and influencing the outcome of a proposed policy or legislation.

You can deliver your public health message in one of the following manners:

- Letter writing
- Telephone calls
- Personal visits
- Legislative gatherings
- Letters to the Editor
- News releases

- Resolutions
- Public or Town Meetings
- Public Hearings
- Press Events
- Candidate Forums

The Approach

Yes, legislators are busy – but part of their job is talking with their constituents – and they work for you. When you call their office for an appointment, you will speak with a staff member. Remember, that staff member is an essential source of information and has influence on the legislator.

Before going to meet with your legislator, do some homework – know the committees on which they serve; their voting record; expertise, and interests.

When you are meeting, be honest and straightforward. Don't make promises you can't keep. Never lie or mislead a legislator about the importance of an issue, the opposition's position or strength or other matters. Have integrity.

What if their opinion differs from yours?

It is important that you listen to their views respectfully. The more you listen, the more you understand why they have taken a particular stance on the issue. Once you know that information, it can help you as you present your information to them.

If their position differs from yours, does that mean you won't have their support? Of course not, because minds have been changed when legislators are given the real facts, with data to back it up; when there are personal stories involved, and when you really express a passion for your issue. Sometimes they have been misinformed by others. Sometimes someone from the opposition asked for support but didn't really talk about the issue. Look at this as an opportunity.

Let's say no matter what you say or do, this legislator will not support your issue- is all lost? No–there is always another day and another issue-they may be a staunch supporter for you on the next issue that arises. They may even agree to be a sponsor of the bill. So don't give up. Remember to treat them with respect and kindness. Always take the "high road".

It is always helpful for you to take someone from your agency or a volunteer, or a coalition member with you (or several), just make sure everyone stays on message. After the meeting, it is important that you write a thank you note to your legislator for the time they spent with you and your group, it is also an opportunity to provide some additional information. Be persistent-follow up, follow-up, follow-up.

E. Do's and Don'ts of Working With Your Legislator:

DO

- **1. Get to know legislators well.** Their districts and constituencies, voting records, personal schedules, opinions, expertise and interests. Be sure to have a good understanding of the legislator and his/her concerns, priorities and perspectives.
- **2. Acquaint yourself with the staff** members for the legislators, committees and resource officials with whom you will be working. These people are essential sources of information and have significant influence in some instances in the development of policy.
- **3. Identify fellow advocates and partners** in the public health community to better understand the process, monitor legislation, and assess strengths and weaknesses. Finding common ground on an issue sometimes brings together strange bedfellows but makes for a stronger coalition.
- **4. Identify the groups and other legislators** with whom you may need to negotiate for changes in legislation. Do not dismiss anyone because of previous disagreements or because you lack a history of working together. Yesterday's opponent may be today's ally.
- **5. Foster and strengthen relationships** with allies and work with legislators who are flexible and tend to keep an open mind. Don't allow anyone to consider you a bitter enemy because you disagree.
- **6. Be honest, straightforward and realistic** when working with legislators and their staff. Don't make promises you can't keep. Never lie or mislead a legislator about the importance of an issue, the oppositions' position or strength or other matters.
- **7. Be polite, remember names and thank** those who help you - both in the legislature and in the public health advocacy community.
- **8. Learn the legislative process** and understand it well. Keep on top of the issues and be aware of controversial and contentious areas.
- **9. Be brief, clear, accurate,** persuasive, timely, persistent, grateful and polite when presenting your position and communicating what you need/want from the legislator or staff member.

- **10. Be sure to follow up** with legislators and their staff. If you offer your assistance or promise to provide additional information, do so in a timely and professional manner. Be a reliable resource for them today and in the future.

DON'T

- **1. Threaten them** "I'll make sure you don't get reelected!" There is no better way to annoy an elected official than to come out fighting. A better approach is to always leave the door open for further discussions. Even if you disagree on an issue, you may agree on the next one.
- **2. Be Anonymous.** Sending nasty notes or making anonymous phone calls just assures you'll be ignored. When writing or calling, ALWAYS include your name and contact information.
- **3. Pretend to speak for everyone.** "Everybody in your district is opposed to this bill." Chances are, elected officials know the strength of support for an issue at least as well as you do. If you are part of a coalition, say so. Don't pretend to represent others' views unless you are a representative of a group.
- **4. Don't invite them to participate.** When they find your group had a meeting to discuss important issues and you didn't invite them, it creates bad feelings immediately. Try to include your legislator when your group meets. They will appreciate your gesture, even if they cannot attend.
- **5. Be a pest.** The more contact, the better. Call or write constantly! While it is a good idea to maintain your relationship with your legislator, don't overdo it. You don't have to comment on everything, but do "put your two cents in" when you are directly affected or feel very strongly about an issue. Abusing your access will ultimately result in being ignored.
- **6. Insist on Immediate Action!!** Realistically, be prepared for delays. The legislature works slowly while committees deliberate and legislators gather support among their colleagues. A delay is better than a defeat, so don't be impatient with the legislative process.
- **7. Don't do your homework.** If you really want to make an impression, know as much as you can about your legislator-their committees, their issues, etc. Each legislator has a

web page-go to it and acquaint yourself with it. Their picture will be there and you won't make the mistake of misinterpreting their gender!

- **8. Ignore the staff.** They are just little people and can't be bothered, right? WRONG!!! You can't make a bigger mistake than this one-get the staff on your side, and you will have an ally in the legislator's office. This relationship is as important as your relationship with the legislator.

F. Influencing How a Bill Becomes a Law

Drafting and Introduction: A legislator comes up with an idea for a bill, and has the Legislative Reference Bureau draft it. The draft is then circulated for legislators to sign on as cosponsors. The bill is then introduced and given a number. Senate Bills are called SB#; Assembly Bills are AB#.

- Advocates can meet with their legislators before the session begins to discuss problems that might be solved by legislation, or to suggest specific bills.
- While in draft form, advocates can approach legislators to cosponsor on personal time.

Referral: The Speaker of the Assembly or the President of the Senate refers the bill to a committee for review. There are several dozen such committees.

- Sometimes the bill's sponsor can request a specific committee. If your legislator sponsors a bill at your request, you can ask if a particular committee might give a more favorable report.

Hearings: Most bills are scheduled for public hearings. The Committee Chair schedules the hearing, usually grouping several related bills to have hearings on the same day. The Legislative Hotline (800-362-9472 / 608-266-9960, or website (<http://www.legis.state.wi.us>)) can tell you which committee is holding a hearing on a particular bill and will give you the Chair's phone number. By calling the Chair, you can verify the date, time, and location of the hearing.

- There should always be at least one advocate testifying at a public hearing. The testimony of constituents who attend the hearing is always more effective than that of

paid staff. Those who are not comfortable speaking can register in favor of or against a bill, submit written testimony, or just attend to support those who are speaking.

- If it is impossible to attend the hearing, you can still have an impact. Usually hearings are scheduled on short notice, so there is no time for letters. If your legislator is on the committee, call the office and leave a message or send an email stating your position on the bill. (Be sure to include your home address in any email messages.) Use personal time for this.

Executive Session: (informally called “Exec-ing the bill”)

This is rarely done the same day as the hearing. Usually the committee takes several weeks to consider the bill. At this meeting, the committee decides what to recommend to the Senate and/or Assembly. The committee may recommend the bill for passage, may recommend amendments, may rewrite the whole bill (called a “substitute amendment”), or may recommend indefinite postponement.

- There is usually enough time between the hearing and the executive session to write letters. If you have a legislator on the committee, send a brief letter explaining your position on the bill and urging a vote for or against it. Organize 3-5 other people in the district to write also. A face-to-face meeting with your legislator is even more effective. Personal time only.
- If you don’t have a legislator on the committee, it is still possible to have an effect. You can ask your own legislator to speak to a committee member on your behalf.
- Also, you can write to the chair, who has some responsibility to consider the wishes of the whole state.

Joint Finance Committee: Bills that affect state or county budgets must be reviewed by the Joint Finance Committee. JFC is made up of legislators from both houses. This committee holds hearings and executive sessions to approve all, part, or none of the funds called for in the bill.

- The suggestions in Hearings and Executive Sessions also apply here.
- In many cases, however, bills before Joint Finance are voted on at the same meeting as the public hearing.

Floor Action: Each bill reported out of committee is then eligible to be scheduled for floor debate by the full body of the Senate or Assembly. Any legislator may propose an amendment or a substitute bill. The full body (Senate or Assembly) must vote on any amendments or substitutes before considering the main bill.

- Since every member of the Assembly or Senate will be involved now, every advocate should be also. Contact your legislator and urge action on the bill. The best move is to arrange a constituent meeting when the person is home in the district. The second best tactic is to write a letter. If neither is possible, you can make a phone call. With either writing or calling, it's important to organize other constituents to do the same. And, remember, do it from home, on personal time.

The Second House: This is a repeat of the steps above, except the committee may exec a bill without a hearing. If the second house makes any amendments, the bill must return to the first house for further consideration. If the bill passes without amendment, the bill goes to the Governor to be signed into law.

- The suggestions in Floor Action apply here.

Conference Committees: If the Senate and Assembly versions of the bill are not identical, a conference committee is appointed. Three members from each body write a new bill, the "Conference Report," which is a compromise version of the two bills. The Conference Report must then be voted on by both houses. It cannot be amended.

Governor's Office: After passing both houses, the bill goes to the Governor for his/her signature or veto.

- Advocates can call or write the Governor to urge his signature or veto.

G. Success Builds on Experience

You can't do this alone!!! It is critical that you partner with fellow advocates, colleagues, and community members. By doing this, you will have the support you need, in many ways. It will enhance your effectiveness, broaden your reach, and provide so much more advocacy to your issues. It will also expand your power base. The more people involved in your issues, the more people will do the advocacy work that needs to be done. You will create a presence for your issue within the media, the community, and the Public Health systems.

Contact the organizations you are affiliated with to talk about your issue, provide information in a timely manner, and ask them for support.

Celebrate your successes....advancing public policy is hard, rough work and you need to take time out and reflect on how far you have come. There are many, many steps along the way and it takes a long time to accomplish all of the thing that need to be accomplished. Give yourself credit. Most importantly, keep your life in balance. If you don't, you will burn yourself out.

When you are feeling defeated, look at the history of Tobacco Control in Wisconsin. As of July 5, 2010, all workplaces and public buildings will be 100% smokefree. Yes, it took a long time to happen, but what a thrill to know that you have changed the future health outcomes of the people of this state for generations to come. What a great legacy to leave!

There are many advocates and experts in policy development within the State of Wisconsin. Call on them for assistance. They are happy to share their experiences.

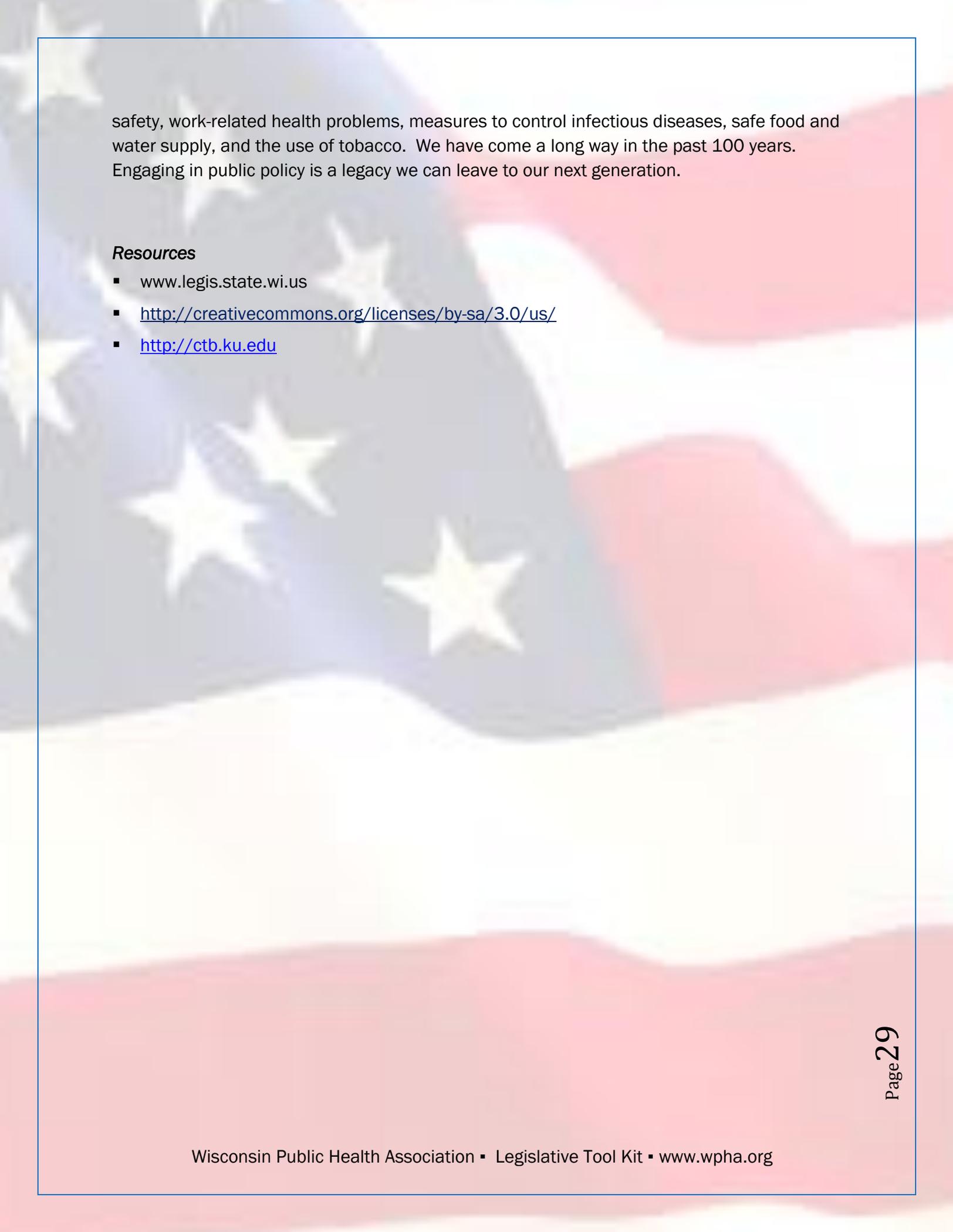
H. Colleagues and Partners

Trying to influence public policy in a vacuum will not only leave you feeling worn and unproductive, but will greatly reduce your effectiveness. For you to be successful in your endeavors, it is critical to identify and partner with fellow advocates and colleagues within the public health community.

When engaging in a policy-making activity, it is important to keep abreast of positions and actions taken by your colleagues and by organizations you are affiliated with. Pick up the phone and talk with your colleagues or WPHA Regional Representative. Visit the WPHA web site at www.wpha.org for a listing of resolutions and position papers that may support your position. Likewise, keep your public health colleagues and organizational representatives informed on your advocacy activities and what is occurring in your community.

Look to your colleagues and partners to explore winning strategies or to rehearse your message to a policy-maker. For those of you who want to become more involved in policy development activities, seek out a colleague with experience. For the more seasoned professional, share your knowledge and perspective with less experienced colleagues. Encourage others to call or write their legislator, host a legislative breakfast or better yet, visit with their legislator. We can all benefit from the opportunity to share ideas, frustrations and successes.

Lastly, give yourself credit for your accomplishments and take the time to celebrate even your smallest victories. It might be as simple as a legislator returning your call. Or better yet, returning your call and finding that he or she has a similar position on the issue as you. Advancing public policy is hard work, but well worth the energy. When you are feeling defeated, think back to a time when there was no public policy that addressed motor-vehicle



safety, work-related health problems, measures to control infectious diseases, safe food and water supply, and the use of tobacco. We have come a long way in the past 100 years. Engaging in public policy is a legacy we can leave to our next generation.

Resources

- www.legis.state.wi.us
- <http://creativecommons.org/licenses/by-sa/3.0/us/>
- <http://ctb.ku.edu>

5. Attachments

A. How a Bill Becomes a Law

“*There ought to be a law*”, a phrase public health professionals have uttered more than once. How does a good idea become a policy solution? For most of us, the legislative process is seen as a tangled web. Not knowing what to say, to whom, and when, has stopped many of us from taking action.

Prior sections in this handbook have provided you with the information you need to be confident in communicating with your policy-maker. This section provides you a brief overview on how a good idea becomes law.

There are approximately eight distinct steps involved in a bill becoming a law.

Step One: A bill may be introduced in either the assembly or senate, where it is read by the chief clerk – first reading.

Step Two: A committee studies the bill and often holds public hearings on it.

Step Three: The committee votes and reports the bill out of committee. The bill is then most often referred to the rules committee. The rules committee can either place the bill on the calendar for second reading and debate before the entire assembly, or take no action

Step Four: At the second reading a bill is subject to debate and amendment before being placed on the calendar for the third reading and final passage.

Step Five: After passing one house, the bill goes through the same procedure in the other house.

Step Six: If amendments are made in one house, the other house must concur.

Step Seven: When the bill is accepted in both houses, it is signed by the respective leaders and sent to the governor.

Step Eight: The governor signs the bill into law or may veto all or part of it. If this happens, the legislature may override the veto with a two-thirds vote in each house. If the governor fails to act on the bill, it may become a law without a signature.

Excerpts from “How a Bill Becomes a Law”, the WI Legislature. Published by Assembly Chief Clerk

B. Myths and Realities

Has there been a time when you wished you would have acted on a public health issue and didn't? There are many reasons why people choose not to get involved in public policy making. The myths we hold about the policy-making process can influence our actions.

“I’m apprehensive about getting too involved in advocacy.” The best advocates are not full-time, paid lobbyists, but rather public health professionals who share their experience with policy-makers and their staff.

“I’m expert on occupational health and I can’t contribute much knowledge on other public health issues.” Being a public health professional gives you a set of skills and expertise, as well as credibility to speak on all issues of public health. You may not know the specifics of immunization policy, but you can speak broadly about the importance of prevention, surveillance, data, and sound science.

“I just do not have the time to engage in policy-making activities.” Public health professionals have full time jobs, families, community commitments, and still make time for advocacy. WPHA makes being an advocate easy by providing you with the resources you need to contact your legislator. With each WPHA action alert, you receive the facts, background, and status of an issue to make taking action an easy endeavor. The effort can take as little as five minutes, and all you need is a stamp, a phone, or e-mail capability.

“My policy-maker is a lost cause. Whatever I am for, she is against.” Write, visit, and call anyway. It’s important for the legislator to know that people in her district care about issues and oppose her position on pending issues. Put your policy-maker on your organization’s mailing list, continuing to provide her and her staff with accurate, high-quality materials that pertain to their district or state. Invite the legislator to your organization. Remember, it is about establishing a relationship with the legislator.

“Isn’t advocacy just another word for lobbying? I’m not a lobbyist, I run a family planning clinic.” The number one job of an advocate is to educate policy-makers and the public. As a public health professional, you have information that policy-makers need. Again, invite your policy-makers to your program, clinic, or organization.

If you do not advocate public health, nobody will. The data show that public health professionals have a lot of work to do when it comes to advocacy. A Harris Poll, conducted in January of 1997, indicates that very few Americans understand what “public health” really means. Therefore, gaining the support of policy-makers and the public can be a real challenge.

C. Candidate Forums

Candidate forums provide an opportunity for legislative candidates to introduce themselves to the public health community and discuss their position on issues impacting public health. The forums do not result in an endorsement for any one candidate.

Benefits and Outcomes	<ul style="list-style-type: none">▪ Provides you and your colleagues insight as to candidate’s positions on issues affecting public health.▪ Increases legislators’ awareness of public health and the public health issues affecting citizens.▪ Increases local policy-makers’ awareness of public health issues.▪ Establishes a cohesive public health community in the eyes of policy makers.
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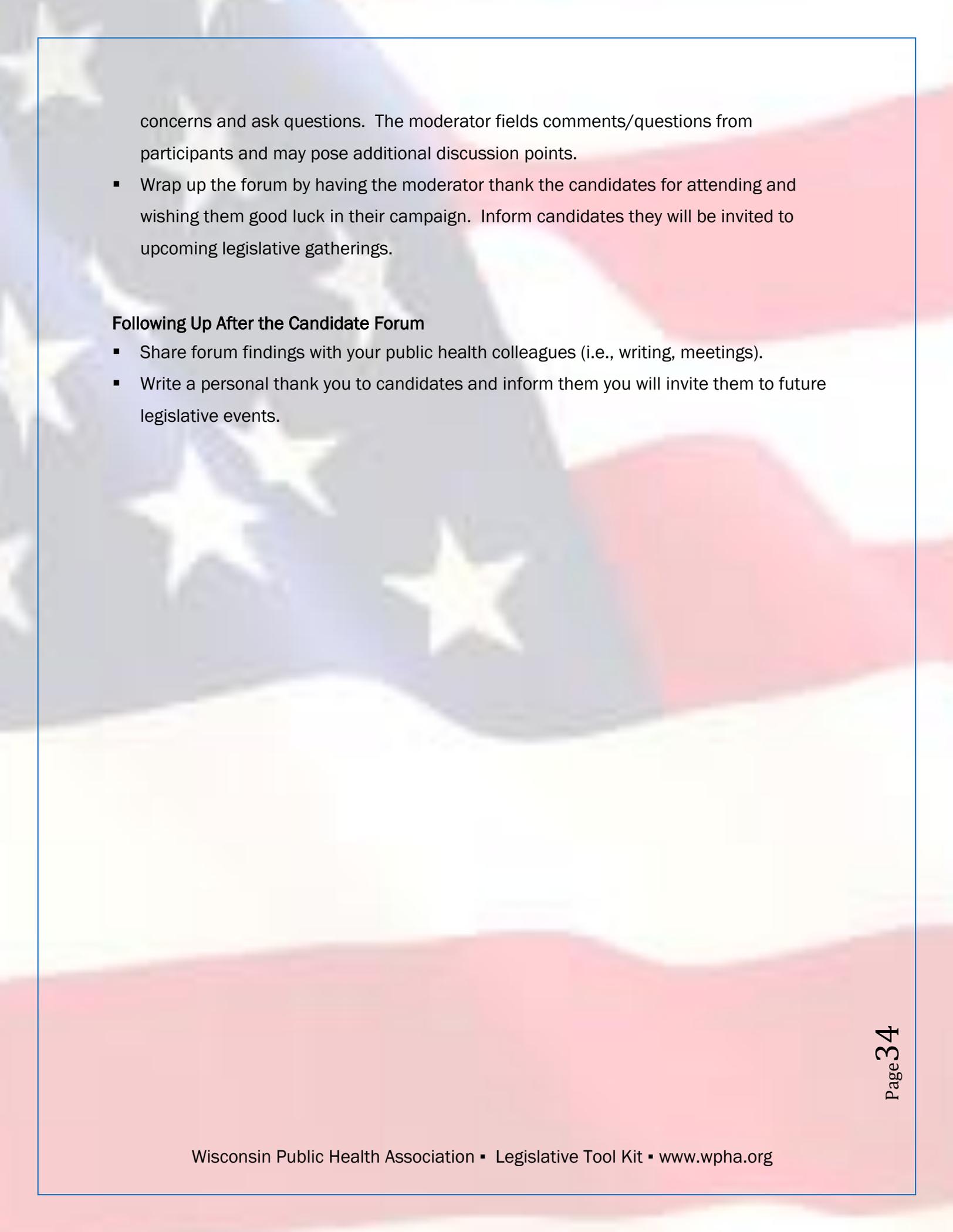
Preparing for the Candidate Forum

- Get an early start, begin preparing 6-7 weeks in advance of the date. Ideal time to hold the forum is 2-4 weeks prior to the primary or November election.
- Decide on whether the candidate forum will focus on candidates running for state and/or U.S. office.
- Determine which legislative districts will be included in the forum with your public health colleagues. You may want to limit the number of districts to no more than one senate district.
- Identify host(s) and sponsor(s) for the event. A local health department may decide to host the event with sponsors from state affiliated public health associations such as WPHA, WALHDAB, and WEHA.
- Find out who the legislative candidates are for State Assembly and Senate and/or U.S. House of Representatives and Senate if applicable. Use the state elections board web site to get names and addresses of candidates by looking under “Nominating Papers Filed” section <http://badger.state.wi.us/agencies/elections/sebpage12.html>.

- Identify format for the forum (forum vs. debate) and what public health issues will be discussed. Refer to WPHA Legislative Platform.
- Decide on who will moderate the forum. The moderator's role is to introduce co-sponsors, legislative candidates and participants as well as handle questions from participants.
- Secure date, time of day and place. Holding a breakfast, lunch or dinner forum may increase attendance and you can use an area restaurant. Plan the forum to be 1½ to 2 hours in length, dependent upon the number of candidates attending. Have tables set up in a round table fashion to encourage discussion.
- Determine who will be invited to participate in the forum (i.e., local policy makers such as Board of Health, County Board of Supervisors, key community partners). Provide them with "Save the Date" preliminary notice using sponsor(s) letterhead.
- Send out an invitation 4-5 weeks in advance to candidates with supporting information on public health and topics to focus discussion on (i.e., WPHA Fact Sheet and Legislative Platform). Include information on who participants will be. Refer to sample invitation letter. Confirm candidates' participation within 1-2 weeks of sending invitation.
- Send out invitation to participants with RSVP.
- Consider the pros and cons of inviting local media. The media can change the focus of the event and the candor of exchange between the candidates and participants.
- Contact candidates by telephone one week prior to the forum to confirm participation and answer questions.

Conducting the Candidate Forum

- Open the forum by explaining the purpose and nature of the forum. Introduce candidates, co-sponsors with brief explanation of the associations' makeup and purpose. Have participants introduce themselves. In some instances, you may not be able to have all the candidates present at the same time and will need to carefully schedule so one candidate follows the other.
- Outline the format for the forum. For example, each candidate is given 10 minutes to provide background information and comments regarding public health. After candidates have presented, participants are given an opportunity to comment on legislative



concerns and ask questions. The moderator fields comments/questions from participants and may pose additional discussion points.

- Wrap up the forum by having the moderator thank the candidates for attending and wishing them good luck in their campaign. Inform candidates they will be invited to upcoming legislative gatherings.

Following Up After the Candidate Forum

- Share forum findings with your public health colleagues (i.e., writing, meetings).
- Write a personal thank you to candidates and inform them you will invite them to future legislative events.

D. Legislative Gatherings

Legislative gatherings create a forum for the exchange of ideas between you, your colleagues, constituents and legislators. People gather to meet their legislator, ask questions on policies that may be affecting their community, and to become better acquainted on issues impacting public health.

Benefits and Outcomes	<ul style="list-style-type: none">▪ Provides an opportunity to meet and get to know your legislator.▪ Increases policy-makers' understanding of public health and issues affecting their constituents.▪ Acquaints policy-makers on issues impacting public health policy.▪ Establishes a cohesive public health community in the eyes of policy-makers.▪ Provides an avenue to recognize your policy-makers' past and current efforts.
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Preparing for the Gathering

- Determine which legislative districts will be included in the gathering with your public health colleagues. You may want to limit the number of districts to no more than one senate district.
- Decide on date, time of day, and place that is centrally located. Consider times of the year when legislators are not in session. Many restaurants will accommodate your meeting if you eat there. Plan the gathering to be about 1-1/2 to 2 hours in length. Have tables set up in a round table fashion to encourage discussion. Participants order off the menu, therefore no costs are incurred.
- Identify host(s) or chairperson(s) and sponsor(s) for the event. It is common for public health organizations such as WPHA, WALHDAB and WEHA to be co-sponsors.
- Determine what issues/concerns will be focused on. It is best to limit your topics to 2 or 3 items.
- Contact legislators and staff with proposed date and time. Follow-up with notice and agenda.

- Determine who will be invited to be part of the gathering (i.e., local policy makers such as Board of Health, County Board Supervisors, key community partners on the issue being discussed).
- Send out the invitation on sponsoring organization's letterhead to participants with RSVP. Include agenda items to be discussed. Provide map with directions as needed.
- Forward a copy of the invitation and agenda to area media. (Optional, depending on how the legislator or sponsoring organization feels about having the media there.)
- Prepare your discussion points. Share pertinent information with your colleagues and participants ahead of the meeting. Refer to section, "Shaping Your Message: Have a Message Worth Listening To".

Convening the Gathering

- Explain the purpose and nature of the gathering. The Host or Chairperson introduces the legislators, co-sponsors with a brief explanation of the association's makeup and purpose. Have participants introduce themselves. Allow time for participants to eat and converse freely.
- Outline the format for the gathering. Agenda items should be discussed first. Keep in mind key points outlined in the section, "Communicating Your Message: Know How to Deliver the Message".
- Allow time toward the end to encourage policy-makers to speak about their key public health issues.
- Wrap up the meeting by summarizing key discussion points and review action items. Thank legislators and participants for attending.
- Decide on frequency of future meetings. Set date and location for next meeting before you adjourn. Share meeting tasks by identifying a meeting chairperson/host for the next gathering. The chairperson/host for the next gathering takes meeting minutes to facilitate mailing with invitation/agenda.

Follow Up

- Hold a debriefing session immediately following the gathering to review how the meeting went, what worked well, and what did not. Strategize on ideas for improving future gatherings.
- Write a personal thank you to legislators who attended and inform them of the next scheduled gathering.
- Share meeting findings with your public health colleagues, including your WPHA Regional Representative (i.e., writing, meeting minutes). Submit an article on the gathering to the *WPHA Communique*.
- Follow up on any action items that were agreed upon during the meeting.

Excerpts taken from “WPHA Annual Conference Poster Session: Strategizing to Increase the Number of Informational/Legislative Breakfast Events.” June 7, 1990.

E. Letters to the Editor

A letter to the editor is an excellent way to communicate an opinion to the general public. Editorials have many audiences including legislative staff, who monitor letters to the editor from local papers. The chances of having your letter printed increase when sent to smaller newspapers or magazines. On average, many local papers publish up to 80 percent of the letters they receive.

Benefits and Outcomes	<ul style="list-style-type: none">▪ Good way to get your message out to the general public.▪ Increases awareness of public health policy issues among the general public and policy-makers.▪ Draws policy-makers' attention to policy issues affecting their constituents.
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Writing Tips

- Be brief and concise. Focus your letter on just one concept or idea.
- Write a letter no longer than what the target newspaper tends to publish. Limit yourself to 250-300 words. Longer letters are more likely to be discarded. If not discarded, the editor will decide what information will be cut to fit the length requirements.
- Refer to other articles, editorials, or letters the newspaper has recently published. This will increase your chances of having the letter printed.
- Include contact information. Include your name, address and telephone number so the paper can contact you with any questions. Also include any titles and degrees that are relevant to help the media know you have expertise.
- Know your organization/agency policy on writing letters to the editor. If you are unable, encourage a colleague or coalition to write the letter.
- Forward copies of the letter to editor to your policy-makers, colleagues and your WPHA Regional Representative.

Using the Opinions of Others

- Clip and forward letters to the editor from local paper(s) to your policy-maker that appear on public health policy issues impacting your community. Accompany the clipping with a short letter emphasizing key points (refer to section, “Letter Writing”).

*Excerpts taken from “APHA Advocates Handbook: A Guide for Effective Public Health Advocacy”.
American Public Health Association. <http://www.apha.org>*

F. Letter Writing

Writing to your policy-maker is a formal means of communicating your opinions and expertise on issues affecting you, and your community. Your policy-makers welcome your letters and take them seriously. Letters should cover only one topic or bill and can be sent at any time throughout the year. However, to be most effective your letter should coincide with the discussion of your issue in the legislature.

Benefits and Outcomes	<ul style="list-style-type: none">▪ Communicates your points and position on an issue in a prepared and organized manner.▪ Allows policy-makers to share your points with his or her staff members as well as fellow colleagues during debates or speeches.▪ Provides an opportunity for policy-makers to reflect on the information you have outlined in the letter.▪ Allows you to recognize your policy-maker's contributions.
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Writing Tips

- Use proper form of address and correct spelling of the policy-maker's name.
- Visit the web site <http://www.legis.state.wi.us> if you are unsure who your Wisconsin representatives are or call U.S. Capitol Switchboard 202-224-3121 for U.S. representatives. The web site contains legislators' mailing address, telephone number and email information.
- Avoid using preprinted letters and postcards.
- Use your agency or organization letterhead whenever feasible.
- Identify yourself as a constituent.
- Distinguish yourself as a public health professional within the text of your letter. Give your official title and professional degree, following your signature.
- Keep your letter to one page.
- Avoid professional jargon, technical terms and acronyms. To test your letter, give it a friend, spouse or your mother to see if they understand it. Reread it and see if the letter makes sense to you if you didn't know anything about public health.

- Time your letter so that it arrives on a Tuesday, Wednesday, or Thursday. Avoid Monday and Friday, for they are heavy mail days. E-mail is an acceptable manner of delivering your letter.

Content of Letter

- State the purpose of your letter in the opening paragraph. Discuss only one issue in each letter.
- Correctly identify the legislation. If you are writing about a specific bill, refer to the bill by name and number and who introduced it. You can get background information on a bill by visiting the web site <http://www.legis.state.wi.us> looking under the header entitled “Legislative Activity”.
- Inform the policy-maker how the issue affects his/her constituents. Use data, research to support your position. In addition, include personal experience and district specific information. Refer to section, “Shaping Your Message: Have a Message that is Worth Listening To”. Attach a fact sheet or newspaper article with supporting information. (Refer to appendices for sample letter and talking points paper in support of tobacco prevention funding.)
- Ensure your facts and assertions are accurate. Policy-maker may use your letter to make points during speeches or debates to convince fellow policy-makers of their position.
- State your position on the issue or bill and how you arrived at that position.
- Ask for specific action you would like to see, e.g., sponsor the bill, work against the bill or amend the bill.
- Request the policy-maker to state their position. Indicate you are looking forward to hearing from them. Provide them with a daytime telephone number or, if a state employee, your personal cell number.
- Acknowledge your policy-makers past support on public health matters.

Follow-up

- Follow up with a letter of thanks when your policy-maker acts to support your position. Thank you letters come few and far between, your policy-maker is more apt to remember you next time you write.



Excerpts taken from “APHA Advocates Handbook: A Guide for Effective Public Health Advocacy.”
American Public Health Association. <http://www.apha.org>. WPHA Legislative Contact: A “How To”
Booklet. November, 1986.

G. News Releases

News releases are one of the most common methods of contacting the media. Issuing a news release informs media outlets of a press event you are holding or an issue to which you are trying to bring attention. News releases are designed to sell your event or issue to the media. The media ultimately determines whether they will cover your “news”.

Benefits and Outcomes	<ul style="list-style-type: none">▪ Raises awareness in your community and among policy-makers of issues impacting public health policy.▪ Provides an opportunity for organizations and coalitions to get their message out and let citizens know what action they can take.
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Tips for Writing

- Provide the name of your organization. Print the release on organizational letterhead.
- Provide a contact name and phone number. The name of the contact person and a phone number should run at the top of the release where a reporter can quickly get more information.
- Convey release time at the top of the release. This release time tells when the information can be published or broadcast. It can read “For Immediate Release” or “Embargoed until (a certain date)”.
- Include a headline. This descriptive phrase needs to sum up the essence of the release.
- Establish the end of the release. Editors and reporters look for a ### or a “-30-” at the end of a release to signify its end.

Content of the Release

- Keep it short and simple. Generally one or two double-spaced pages.
- Structure a news release like a pyramid. Address, who, what, where, and why first; followed by more information.
- Develop a strong lead. The first sentence, or the lead, tells the reporter the most important information. It has to grab her or his attention.

- Use a quote. Quotes help put a human face on the news you write. The quote should support the lead, be from a credible person, and add a piece of information.
- Use short sentences and avoid professional jargon. Put only one or two sentences in each paragraph.
- Conclude with what is called “boiler plate” information, such as a paragraph description of your agency, your coalition, or the goals of the work highlighted in the release.

Excerpts taken from “APHA Advocates Handbook: A Guide for Effective Public Health Advocacy”. American Public Health Association. <http://www.apha.org>

H. Personal Visit

Introducing yourself and becoming acquainted with your policy-maker is one of the most effective ways to influence the policy-making process. A visit with your policy-maker in person will make a lasting connection.

Benefits and Outcomes	<ul style="list-style-type: none">▪ Effective way to become acquainted with your policy-maker.▪ Humanizes the policy-maker.▪ Builds a relationship, whereby your policy-maker is more apt to remember you in future correspondences, whether it is a telephone call or letter.▪ Provides an opportunity to develop a long term working relationship.
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Arranging a Meeting:

- Call for an appointment to meet with your state or federal legislator. Send a follow up letter once you have scheduled a meeting with a U.S. Representative or the Governor.
- Visit the web site <http://www.legis.state.wi.us> if you are unsure who your Wisconsin representatives are. The web site contains legislators' mailing address, telephone number and email information. For U.S. representatives, call the U.S. Capitol Switchboard at 202-224-3121.
- Identify yourself as a constituent in your telephone call or within your letter. Appointments are arranged through legislative staff or scheduler. It is okay to meet with a staff person, if your legislator is not available the day you plan to visit.
- Explain the nature of your visit. Identify what you want to discuss, when you would like to meet, and the names of any colleagues or constituents who may be accompanying you.
- Determine whether you wish to meet with the policy-maker's staff person if your legislator is unavailable.
- Call to confirm the appointment a day or two prior to your visit.

Conducting a Meeting:

- Arrive on time. If meeting with a staff person, be sure you have the correct contact name. Don't be put off by meeting with a staff person if your policy-maker is unable to meet with you.
- Prepare your discussion points ahead of time. If your colleagues or constituents are accompanying you, ensure you agree on what points will be made and which one each of you will discuss. Refer to section, "Shaping Your Message: Have a Message that is Worth Listening To".
- Deliver your message in 15-30 minutes. Introduce yourself and your colleagues or constituents. Explain why you are concerned about the issue and why you have expertise regarding the issue. Refer to section, "Communicating Your Message: Know How to Deliver the Message".
- Prepare to answer questions.
- Offer your time and assistance if he/she wants to talk about your areas of interest and expertise in the future. Let your policy-maker know you are a resource.
- Provide supporting material as needed. Leave behind your business card and a one-page fact sheet summarizing your position.

Follow Up:

- Send a thank you letter. Include any additional information you may have promised or that may be relevant to the issue.
- Plan an opportunity to have your policy-maker visit your agency for a upcoming public health event.

Excerpts taken from "APHA Advocates Handbook: A Guide for Effective Public Health Advocacy." American Public Health Association. <http://www.apha.org>.

I. Press Event

One of the most effective communicating a news story is to speak to reporters individually. However, on occasion, you may find it beneficial to hold a press event or news conference to draw attention to a particular public health issue. Holding a press event or news conference is valuable when you want to release new important information, emphasize an issue or concern, or when an influential person is visiting your community.

Benefits and Outcomes	<ul style="list-style-type: none">Increases visibility of a particular public health issue within your community and among policy-makers.
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Preparing for the Event

- Be aware of media schedules. Best times to hold the event is around 10 AM or 11 AM and preferably on Tuesday, Wednesday or Thursday when reporters are usually more readily able to attend.
- Avoid scheduling the event with competing news stories (i.e., sporting events, holidays).
- Decide on who will host the event. Contact your colleagues, partners and advocates to decide who would be viewed more credible and likely of capture press coverage.
- Determine who will speak and time frame allocated. Limit the number of speakers to no more than five. The entire event should take place within 15 to 20 minutes, allowing time for questions.
- Secure the location. Find a bright, quiet space that is convenient for journalists and easy to find. The room should not be too large as to look empty. Use a facility that highlights public health. For example, a local health department, a school, clinic, or community park. Make sure there is adequate open space for television cameras, lights and microphones. Electrical outlets are a must.
- Notify the news media. Send or fax a news release several days to a week in advance. Include in the release the date of the event, time, location with brief directions as necessary, the names of speakers, and an eye-catching summary of the event.

- Call the journalists. Follow up in a day or two as to receipt of the news release. Ask if they or someone from their office plan to attend. A follow-up phone call will ensure that your contacts know about the event and remember to put it on their calendars.
- Determine whom to invite. For state policy-makers, the more people in attendance the better. Attendance is hard to predict. Do not be disappointed when fewer individuals show up than invited.
- Select a moderator. Decide who will make opening remarks, introduce each speaker, and field and direct questions following the presentation.
- Secure background sketches of the speaker(s) and fact sheets about the issue you are addressing.

Holding the Event

- Bring a media kit for each journalist to include news releases, background sketches of speaker(s), and fact sheets. Bring extra kits.
- Provide resource people to assist journalists before and during the conference. Resource people can manage a sign-in list, direct journalists to the nearest phone, or handle other last-minute details.
- Provide each journalist with a media kit.
- Make opening remarks and introduce each speaker.
- Proceed with the presentation portion of the press event. Presentation should be concise and as brief as possible.
- Allow time at the conclusion of the event for speakers to take personal interviews, arrange photos, or answer more detailed questions.

Follow Up

- Call the reporters who attended and ask them if they need further information. Thank them for attending.
- Share any write up of the event with your colleagues and WPHA Regional Representative.

J. Public Hearings

Testifying before a legislative committee, city council, or county board is a great opportunity to educate and influence policy-makers who have jurisdiction over programs and funding that impacts public health. Public hearings are a way for policy-makers to hear the opinions of their constituents on a proposed bill or referendum.

Benefits and Outcomes	<ul style="list-style-type: none">▪ Creates an opportunity to raise key points that policy-makers may have not thought of in regard to the pros/cons of proposed bill or referendum.▪ Provides an avenue for a large number of citizens to voice their position.▪ Influences policy-makers' position on a proposed bill or referendum.
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Tips for Preparing Testimony

- Encourage your colleagues, representatives from coalitions and the community at large to attend the public hearing.
- Persuade colleagues and community members who are not comfortable in presenting oral testimony to attend and leave a written statement.
- Do your homework. Find out about the committee members and their particular interests and record on the subject at hand. Be sure to address these members' concerns when presenting your testimony.
- Prepare a brief and concise written statement for testimony. A written statement can be longer than your oral statement.
- Your written statement will be part of the official record and should include:
 - A title page;
 - A clear presentation of your position: "I support/oppose _____";
 - Factual arguments and data as evidence to support your position. Consider including scientific studies, research papers, editorials and news articles, and WPHA developed resources;
 - A conclusion that summarizes your basic position.

- Practice your oral testimony. Practicing your oral testimony will ensure you are comfortable and convincing.

Tips for Presenting Testimony

- Keep your oral testimony to no longer than five minutes or the allotted time. Summarize your written statement into three concise points.
- Be polite. Address the policy-makers as Chairman or Madame Chair _____, Mayor _____, Senator or Representative _____, or Mr. or Ms. _____.
- Concentrate your remarks on what can be done. Keep your remarks as positive as possible. Instead of reinforcing negatives, concentrate on what will enhance or improve a program or condition.
- Use your best professional judgement in suggesting what action committee members should take. Policy-makers are looking to learn from your experience and recommendations.
- Avoid scientific or professional jargon.
- Stick to your main points, as excessive detail will lose the attention of committee members.
- Speak clearly, loudly, and make eye contact when presenting your remarks.
- Leave your written statement if you are unable to provide oral testimony due time restraints.
- Thank the committee members for their time.
- Share your written statement with your colleagues and WPHA Regional Representative.

Excerpts taken from “APHA Advocates Handbook: A Guide for Effective Public Health Advocacy”. American Public Health Association. <http://www.apha.org>

K. Public or Town Meetings

Taking part in a public or town meeting is a way to share your expertise and communicate your interests and concerns to policy-makers. Such events generally take place in your community or district and provide an opportunity for policy-makers to hear from constituents on a wide range of concerns.

Benefits and Outcomes	<ul style="list-style-type: none">▪ Informs and educates policy-makers and members of your community on public health matters.▪ Attracts attention to an issue and your position.▪ Gains press coverage on the issue.▪ Positions yourself and your organization as experts and advocates on the issue.▪ Encourages citizen input in the policy-making process. Provides an opportunity to bring large numbers of people out to express their opinion.
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Tips for Preparing to Speak

- Determine the purpose and tone of the event. Find out what the overall agenda of the meeting will focus on, who else is expected to participate or make a presentation, and the anticipated “tone” of the meeting. This will help you to prepare your remarks and delivery style.
- Use your network. Share information about the meeting with other colleagues, partners, coalitions and advocates.
- Encourage as many public health advocates to attend the town meeting as appropriate. This will lend support to your efforts and demonstrate to your policy-maker the extent of community support for a particular initiative.
- Decide on what points you will address and what points are better presented by your public health advocates. Let your public health advocates know what points you will speak to and suggest areas they may want to address.
- Be prepared with accurate, timely, and relevant information.

Tips for Presenting

- Work to present your position or statement as early in the meeting as you are able, as the press is more likely to attend and cover the first part of the event.
- Keep your presentation brief. Limit your statement to three clear and concise points. Provide persuasive facts to assist participants to understand and remember your points.
- Practice your statement to ensure you are comfortable and convincing when sharing your points with a larger audience.
- Provide written copies of your statement to policy-makers, his/her staff, and the press.
- Inform your colleagues and WPHA Regional Representative on the outcome of the meeting.

Excerpts taken from “APHA Advocates Handbook: A Guide for Effective Public Health Advocacy”. American Public Health Association. <http://www.apha.org>

L. Resolutions

A resolution is a statement of a community or associations' position on a given public health issue. Resolutions are most commonly organized at a city/county governmental level, or at a state level among state associations. When passed and forwarded to your legislators, it can send a clear message from constituents.

Benefits and Outcomes	<ul style="list-style-type: none">▪ Increases awareness of the issue among local and state policy makers.▪ States what action is to be taken and probable impact on public health.▪ Identifies other organizations that are in support of the position.
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Drafting the Resolution

- Determine if the resolution is to be organized at a local government level and/or state level.
- Identify other public health colleagues who are supportive of the need for a resolution. Share draft language with your colleagues, even if the resolution will be organized at a local government level.
- Research the background of the public health issue; what is the nature of the issue, what action is recommended, what is the probable impact by taking action.
- Prepare the language of the resolution by using a standard format determined by your local government or association (refer to WPHA web site www.wpha.org for examples).

Passing the Resolution

- Secure support from within your community or association prior to presenting the resolution. Talk with constituents, coalitions, and policy-makers as applicable.
- Present the resolution to your local government by someone who is viewed as credible in the eyes of the policy-makers.
- Be prepared for questions that may be asked. Refer to section, "Shaping Your Message: Have a Message that is Worth Listening To".

Follow Up

- Share a copy of the passed resolution with your public health colleagues and affiliated associations.
- Encourage your public health colleagues and affiliated associations to pass a similar resolution.
- Forward a copy of the resolution to state policy-makers, organizations and associations named within the resolution, as well as your legislators.

M. Telephone Calls

A phone call to your policy-maker can be effective in influencing the outcome of a piece of legislation. You can call the offices of any of your policy-makers, whether they are local, state, or national representatives.

Benefits and Outcomes	<ul style="list-style-type: none">▪ Quick way to communicate your message to your policy-maker.▪ Effective way to allow constituents to voice their opinions on proposed legislation.▪ Simple way to encourage others to voice their opinion by calling their policy-maker.
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Tips when Calling:

- Obtain your state legislator’s phone number by either calling the Legislative Hotline at 608-266-9960 or visit the web site <http://www.legis.state.wi.us>. The Legislative Hotline can find your legislator when you provide your name and address. For U.S. legislators, call the U.S. Capitol Switchboard 202-224-3121 and ask for the office of your Senator/Representative.
- Call your legislator directly. While, you can use the Legislation Hotline to relay your message to your Senator or Representative, calling your legislator directly is still the best possible way of communicating your position.
- Start your call by saying, “Hello, I would like to leave a message for Senator/Representative _____.”
- Introduce yourself by saying, “My name is _____, and I am from _____.”
- State your opinion by saying, “Please let the Senator/Representative know that I (support/oppose) (bill number and title).” You can get background information on a bill (bill name, number, status) by visiting the web site <http://www.legis.state.wi.us> under header entitled “Legislative Activity”. For your own information, you may want to ask what the legislator’s opinion is on the issue.
- End your call by saying, “Thank you.”

Excerpts taken from “APHA Advocates Handbook: A Guide for Effective Public Health Advocacy.”
American Public Health Association. <http://www.apha.org>

N. Sample Letter in Support of a Bill

Here is a generic sample letter that you can use. Feel free to change it to suit your community.

Dear Representative (Name):

I believe it is extremely important that ethanol be a renewable fuel choice here in Wisconsin and I urge you to support efforts to increase Wisconsin's ethanol industry.

As you know, ethanol plants have had a positive impact on the economy. They provide full-time jobs and keep people in the area employed and putting food on the table for their families. In addition, ethanol plants help to expand Wisconsin's tax base.

Ethanol also has the ability to help improve our environment. Studies have indicated that ethanol use reduces our greenhouse gas emissions by 12 to 19 percent compared with gasoline.

Ethanol production has had a positive impact on the economy and on the environment and deserves our support.

I hope you will support Wisconsin's ethanol industry and the people you represent in the legislature. Working together we can continue to build rural communities not only in this district, but around the state.

Respectfully,

Your Name
Your Address
Your Phone

O. Sample Talking Points Paper

Preventing Youth Smoking

#1 Message: The Wisconsin Tobacco Prevention and Control Program is working and deserves to be fully funded. No other state program has demonstrated this type of measurable impact.

#2 Message: Tobacco prevention and control programs keep kids from starting and helps them quit.

- Middle school smoking rates **dropped** 37% - that's **10,000 fewer middle school smokers**.
- Smoking among high school students has been reduced by 45%. That's **45,000 fewer high school smokers** in 2004 than in 2000.
- The Wisconsin WINS program **reduced illegal sales of tobacco to minors by over 75 percent statewide**, from over 33 percent in 2001, to just over 8 percent in 2004.
- In our local community, we've reduced illegal sales of tobacco to minors from 33% in 2001 to 27% in 2004.
- 50% of 16 year olds who smoke want to quit. The Not-On-Tobacco Program, a partnership with the American Lung Association of Wisconsin, has helped **hundreds of Wisconsin middle and high school students quit** or reduce their smoking.
- Highlight any local program successes

#3 Message: Despite the successes of the tobacco prevention and control program, more needs to be done to prevent youth smoking:

- Drive by any local high school and you'll notice that we have more work to do. 1 in 5 children still smoke.
- The tobacco industry spends \$247 million/year on marketing their products in WI while the Tobacco Prevention and Control Program has a meager budget of \$5 million.

#4 Most important message: There are two things that the Legislature can do to reduce youth smoking:

1. Raise the price of tobacco products significantly – it's the single most effective way to reduce youth smoking. 72,000 youth in WI would be prevented from smoking if the price of tobacco products were raised by \$1.
2. Fully fund the tobacco prevention and control program so that WI can further reduce smoking among youth.

P. Sample Written Testimony

To Members of the Joint Finance Committee:

2009

Thank you for allowing me the opportunity to present information to you. I know that you have heard from scores of people from all over the State of Wisconsin about tobacco control and the three budget items relating to that, and you are probably tired of hearing about it. I understand. I will be brief.

1. Secondhand smoke is a health issue. It sickens people in the form of heart disease, strokes, and cancer. 70% of citizens from WI want it eliminated from all public buildings, including bars, restaurants, bowling alleys, and places where people gather. It kills—there is no safe level of exposure. Every worker in this state has the right to work in a safe, smoke-free worksite. That includes all workers. This should remain in the budget because by enacting this policy, millions of dollars in health care cost will be saved.
2. As you have seen from the past, when the cigarette tax is raised, people stop smoking. Fewer youth start smoking. Health care costs decrease.
3. The legislature has put their trust in the Tobacco Control Program over the past 9 years and we have successfully decreased youth smoking rates from 38% to 19%; We have decreased youth access to tobacco rates from 31% to 8%; We have decreased exposure to secondhand smoke in 14 communities; the adult smoking rate has dropped from 24% to 19%. This is a program that works—please continue to fund this program at the current level.

Finally, thank you for allowing me to present this information, and I will leave you with several thoughts. You have the power to change lives for the better in this state. You have the power to leave behind a legacy that will be remembered for many years to come. What a great impact you can make. Thank you.

Sincerely,

Your Name
Your Address
Your Phone