

IMPACTING SOCIAL POLICY

Understanding Advocacy

Welcome

THE *NONPROFIT QUARTERLY* HAS ALWAYS TAKEN THE POSITION THAT ADVOCACY should be a core competency for nonprofit managers. Why? Because as many external as internal factors effect your organizational capacity. Regulations, public policy and funding patterns have an enormous effect on what outcomes your organization is able to produce. Yet many nonprofit managers and board members are not clear about how much advocacy they can do, what their particular advocacy agenda should be or how to organize themselves for it. The articles contained in this collection will help walk the reader through some of these issues. It can serve as an excellent primer for those just getting started.

We have also included some articles here about how to work with the media on campaigns and advocacy agendas.

This collection is published at a time when there is much on which nonprofits should be active: the federal budget, tax policy, additional proposed regulations for nonprofits now being considered by the Senate Finance Committee, the House Ways and Means Committee and the Joint Committee on Taxation. In many cases, we are each too small to have much effect on our own—we have to join with others to make sure we are heard.

For this reason we have listed a few links where you can find information and advocacy partners.

We also recommend that you check out the following time sensitive articles from the Spring 2005 *Nonprofit Quarterly*: Rick Cohen's "The Bush Budget Disaster" (www.nonprofitquarterly.org/670), Chuck Collin's "Responding to the 'Shrink, Shift, and Shaft' Tax Cut Agenda" (www.nonprofitquarterly.org/bbg), and our special supplement on the Nonprofit Regulatory Landscape, 2005 (www.nonprofitquarterly.org/section/700.html).

Ruth McCambridge
Editor in Chief

The *Nonprofit Quarterly* has always taken the position that advocacy should be a core competency for nonprofit managers. Why? Because as many external as internal factors effect your organizational capacity.

5

**Advocacy and Lobbying Without Fear:
What Is Allowed within a 501(c)(3) Charitable Organization**

by Thomas Raffa

11

The Meaning and Actions of Advocacy

by David Aarons

13

Framing Social Policy

by William A. Gamson

19

Separate, We lose

by Pablo Eisenberg

24

Essentials for Advancing Nonprofit Advocacy: Board Leadership

by Marcia Avner

31

Advocacy by Design: Using Direct Media to Get a Direct Response

by Annette R. Duke

36

A Conversation with Eli Pariser: Online Fundraising and Engagement

by Ruth McCambridge

39

Becoming a Reliable Source: A Conversation with Rob Restuccia

by Ruth McCambridge

Advocacy and Lobbying Without Fear: What Is Allowed within a 501(c)(3) Charitable Organization

by Thomas Raffa

THOSE OF US WORKING WITHIN THE NONPROFIT COMMUNITY, AND PARTICULARLY IN or with 501(c)(3) public charities, recognize advocacy as a vital part of our mission. However, many of us get caught up in the delivery of services and may spend very little time advocating for the very systemic changes that could reduce the extensive need for the services we deliver. I am certain that we can agree that there may be no better spokespersons for the sick and elderly than those who commit themselves to nursing home service and hospice care. And who are more qualified to testify to successful rehabilitation methods than those who counsel in local drug clinics?

However, in my daily practice, I have come to recognize that time and money are not the only causes for a limited advocacy program. Often, it is a lack of understanding about what one can and cannot do when your public charity gets involved as an advocate in the public policy arena. There is confusion as to the distinctions between advocacy and lobbying, limited knowledge of the related lobbying regulations, and a resulting uninformed concern over losing one's tax-exempt status.

While it is true that a public charity under the Internal Revenue Code Section 501(c)(3) is not allowed to take part in a political campaign on behalf of any candidate for public office, there are no such restrictions on cause-related advocacy. In fact, even lobbying can be undertaken by a public charity without any risk to its tax-exemption so long as these efforts are not a substantial part of its activities.

Lobbying Defined

Direct lobbying is attempting to persuade legislators to enact or not enact a bill. Grass-roots lobbying involves encouraging the constituency of legislators to exercise their influence with such legislators on behalf of or against some legislation. Political campaigning consists of working for or against candidates' election to office. (See pages 9 and 10 for extended definitions.)

While it is true that a public charity under the Internal Revenue Code Section 501(c)(3) is not allowed to take part in a political campaign on behalf of any candidate for public office, there are no such restrictions on cause-related advocacy.

Also, it may be important to your organization to note that these rules apply only to the organization and not to individuals acting in their individual capacity and not as a representative of the organization.

Is It Advocacy or Is It Lobbying?

Under these definitions, there are in fact a great number of activities an organization can engage in that are neither campaigning nor lobbying, thereby eliminating the concern for legal repercussions that lobbying might have on the tax exemption of a “public charity.”

For example, the following activities are not lobbying:

- Efforts to make an administrative agency of the government change its policies, rules or regulations, or to adopt new ones, are not considered lobbying.
- An exempt organization can target a political executive (e.g.: a mayor or governor) so long as they are not being asked to promote, discourage or veto legislation.
- Your organization can develop a general policy position directed at issues as long as the issues have not been reduced to a specific legislative proposal.
- Testifying before a legislative committee on a matter for which the organization has received a written request from the committee to testify.¹
- Non-partisan voter registration drives are also allowable,² as is voter educational material so long as such material: 1) States the position of all candidates without any evaluation of the candidates, 2) covers a broad range of issues without any particular bias toward such matters, and/or 3) describes the candidates’ positions in ways that do not show bias on the issues or a preference.

Applies to Organizations Not Individuals

Also, it may be important to your organization to note that these rules apply only to the organization and not to individuals acting in their individual capacity and not as a representative of the organization. Staff or board members can advocate individually or join volunteer advocacy groups formed to advance positions as long as the group has no connection to the exempt organization with which the individual is associated.

In acting on your own, you should not use the letterhead of your exempt organization; in addition, if your name is to appear on the letterhead of some unrelated group that may be lobbying, it is always better not to list your organization’s name. Several of my clients have an individual that is so closely associated by the public with their organization that I encourage he or she not to participate “on their own” unless we can track such activity within the organization to ensure it is not substantial.

Options Available Under the Law for Lobbying

In understanding some of the aforementioned distinctions, you may determine that your organization does need to lobby or that some of its “advocacy” activities may begin to meet the lobbying definitions. While it is true that the actual boundaries can, at times, only be ascertained through an in-depth knowledge of the code sections, regulations, revenue rulings and case law, this should not discourage you from pursuing your efforts. You simply need to be aware of the options available under the current law and have available to the organization professional counsel to address any specific nuances that may arise.

First, there is the “traditional” test under which no “substantial part” of the organization’s activities can consist of lobbying. Unfortunately, there is no specific definition by

the IRS of “what is substantial,” therefore, the amount of lobbying activity allowed to a given organization may ultimately depend on the extent and nature of its other activities.

It was once suggested that less than five percent of an organization’s time and effort involved in legislative activities is not “substantial.”³ However, this may be misleading in that several cases have established that the political activities of an organization must be assessed in the context of its objectives and circumstances to determine whether a substantial part of its activities was to influence or attempt to influence legislation.

An exempt organization that desires to steer clear of such murky waters can employ Section 501(h) of the Code.

The H Election

Under this Code section, a public charity can elect to track their lobbying activities using a predefined “expenditure test.” An organization may make the election by filing Federal Form 5768 Election/Revocation of Election by an Eligible Section 501(c)(3) Organization to Make Expenditures to Influence Legislation. It is important to note that the election pertains only to lobbying and that any involvement by the exempt organization in political campaigns on behalf of or in opposition to any candidate for public office is still forbidden. However, by making this election, the “substantial” lobbying becomes a matter of definition for the public charity organization.

A public charity making the Section 501(h) election may spend up to a certain dollar amount of its “exempt purpose expenditures” to influence legislation without incurring tax or losing its exempt status. Under the expenditure test there are limits for direct and grassroots lobbying expenditures (see expenditure test box on page 10). If the organization does not meet the expenditure test (i.e., it spends in excess of the amounts allocated under Section 501(h)), it will owe a 25 percent excise tax on its excess lobbying expenses. In addition, if over a 4-year period the organization’s average annual total lobbying or grassroots lobbying expenditures are more than 150 percent of the direct and grassroots dollar limits, respectively, the organization will lose its exempt status. This is a one-time election and, if the organization wishes to revoke the election, it may do so using the same form.

No Election

When an H election is not made, it is up to the organization to ensure that “no substantial part of the activities of the organization is carrying on propaganda or otherwise attempting to influence legislation.” While the rules under the H election are clear and objective, it should be obvious from our discussions above that the “no substantial part” tests rests upon subjective criteria that have been developed in an inconsistent and unclear manner.

It is interesting to note, however, that some activities, which would clearly not be lobbying under the rules that apply to organizations that have made the election, may in fact be lobbying under the “no substantial part” test. Most of this uncertainty involves grassroots lobbying and the communication rules listed above. For example, the nonpartisan analysis or research material which presents full and fair disclosure of the facts so that the reader can

A public charity making the Section 501(h) election may spend up to a certain dollar amount of its “exempt purpose expenditures” to influence legislation without incurring tax or losing its exempt status.

If your organization plans to do a substantial amount of lobbying, you may want to consider establishing a 501(c)(4) organization. No limits are imposed on the amount of lobbying by a (c)(4) organization—it can also do more campaigning as long as doing so is not its primary purpose.

form an independent opinion on the issues will not be considered grassroots lobbying under 501(h), but would most likely be considered lobbying without the H election.

As the test for those who have made the H election is based solely on expenditures, lobbying may be done by uncompensated board members without limit and may not have any effect on the organization's tax status. Under the "no substantial part" test, such efforts would be included.

On the other hand, by not making the election, an organization is not subject to the strict rules that require the detailed accounting for direct and grassroots lobbying as discussed above in the "expenditure test." As the regulations are vague and do not use dollar limits in defining what is substantial outside the election, they can provide an organization with much more flexibility and judgement in determining what is considered substantial and place the burden on the IRS to prove otherwise.

Consider a 501(c)(4)

If your organization plans to do a substantial amount of lobbying, you may want to consider establishing a 501(c)(4) organization. No limits are imposed on the amount of lobbying by a (c)(4) organization—it can also do more campaigning as long as doing so is not its primary purpose. In some circumstances, the organization may have to pay a tax on expenditures incurred in connection with political activity. Such (c)(4) organizations are tax-exempt but contributors are not eligible for the charitable deduction afforded to the contributors to a 501(c)(3) organization. Many of my (c)(3) clients that want to develop a significant political agenda may set up a "sister" (c)(4) organization through which they can safely carry out lobbying activities. Many have the same or similar board members for both organizations. As long as the (c)(4) is supported solely by after-tax dollars and receives no support from its sister (c)(3) organization (including both direct and in-kind support), there should be no problem with the lobbying regulations.

Conclusion

Our firm is often asked to make a recommendation as to whether a client exempt as a public charity under 501(c)(3) should make the Section 501(h) election. To do so requires discussions as to the extent and type of the current and planned activities of the organization. Most organizations may be surprised that many of their own activities are not lobbying but advocacy. Moreover, that, when properly accounted for, lobbying efforts may not be as "substantial" as one might believe. Although few enjoy the exercise of properly accounting for "actual" direct and indirect lobbying expenditures or projecting future costs for these activities, it is certainly the best method by which to make an informed decision. In the cause of advocacy, such knowledge is power. With this knowledge, you may find that your organization can do quite a lot to fulfill its mission and advance its causes without crossing the line and risking its tax-exempt status.

Endnotes

1. See Rev. ruling 70-449.
2. See Rev. ruling 74-574.
3. *Seasongood v. Commissioner*, 227 F.2d 907, 912 (6th Cir. 1955)

About the Author.

Thomas Raffa is the managing partner of Raffa and Associates, P.C., a certified public accounting and consulting firm based in Washington D.C. Contact: 202-822-5000, tom@raffa.com.

Copyright 2000. All rights reserved by Third Sector New England, Boston, MA. (Volume 7, Issue 2). The *Nonprofit Quarterly* features innovative thinking and management practices in the nonprofit sector. For reprint permission or subscription information please go to www.nonprofitquarterly.org/subscriptions.

IRS Definitions

Lobbying activities consist of “attempts to influence legislation by propaganda or otherwise.” Such activities can be conducted directly or indirectly.

Direct Lobbying communication is any attempt to influence legislation through communication with any member of a legislative body (i.e. a congress person or senator) or any government official or employee who may participate in the formulation of legislation. For the communication to be considered direct lobbying communication, it must refer to specific legislation and reflect a view on such legislation.

Indirect Lobbying activities are those “grassroots lobbying communications that attempt to influence legislation through attempts to affect the opinions of the general public.” Like direct lobbying communication, it must refer to specific legislation and reflect a view on such legislation. Furthermore, to be considered lobbying, it must also “encourage the recipients” of the communication to take action with respect to such legislation.

Encouraging a recipient to take action with respect to legislation means that the communication:

1. Directs the recipient to contact a legislator or employee of a legislative body;
2. Provides the address, telephone number or similar information of a legislator or an employee of a legislative body;
3. Provides the recipient with a tear-off postcard or similar material to communicate with a legislator or an employee of a legislative body or any other government official or employee who may participate in the formulation of legislation; and
4. Specifically identifies one or more legislators who will vote on legislation in support of or opposing the organization’s view.

Moreover, that,
when properly
accounted for,
lobbying efforts may
not be as
“substantial” as one
might believe.

The Expenditure Test Under the H Election

Exempt Purpose Lobbying	Expenditures non-taxable amount
Not over \$500,000 [As defined in Section 4911(e)(1)]	20% of exempt purpose expenditures
Over \$500,000 but not over \$1,000,000	\$100,000 + 15% of the excess of exempt purpose expenditures over \$500,000
Over \$1,000,000 but not over \$1,500,000	\$175,000 + 10% of excess of exempt purpose expenditures over \$1,000,000
Over \$1,500,000 purpose expenditures over \$1,500,000	\$225,000 + 5% of the excess of exempt
Over \$17,000,000	\$1,000,000

Grassroots = 25% of lobbying non-taxable amount.

An example of determining taxable excess expenditures

The tax is triggered when either lobbying expenses or grassroots expenditures exceed the nontaxable amounts. The greater of the two “excesses” becomes the amount of taxable excess.

Facts: Direct lobbying expenditures = \$425,000

Grassroots expenditures = -0-

Total Exempt Purpose expenditures = \$4,000,000

Tax: The non-taxable lobbying amount is \$350,000 [$\$225,000 + (5\% \text{ of } (\$4,000,000 \text{ less } \$1,500,000))$]. Excess lobbying expenditures equal \$75,000 ($\$425,000$ lobbying expenditures less $\$350,000$ nontaxable lobbying expenditures). The tax due is \$18,750 (25% of \$75,000).

Ceiling: The ceiling on lobbying expenditures is \$525,000 (or 150% of \$350,000). A 501(c)(3) that “normally” exceeds the ceiling will lose its exemption.

The Meaning and Actions of Advocacy

by David Arons

THE WORD ADVOCACY CAN MEAN MANY DIFFERENT THINGS IN THE NONPROFIT WORLD AND can be at the heart of activities, strategies, mission, core values, and overall organizational effectiveness. Fundamentally, advocacy is about speaking out and making a case for something important. The target of the advocate's voice is most often a person, group or institution that holds some power over what the advocate wants.

Advocacy can be a challenging concept because there is no one set of instructions about where to begin, how to begin and what constitutes effectiveness. Moreover, our lexicon for advocacy-related concepts and actions complicates matters by using multiple words for the same actions, as well as by blurring understanding of what an organization is really doing. The word advocacy is often used interchangeably with related words such as lobbying and education. An outsider is not certain whether they mean engaging in public policy, or advocating on behalf of clients or their mission in other ways.

The term "lobbying" is much narrower in definition than advocacy or civic participation. Lobbying is legal strategy nonprofits use to influence legislators and executive branch administrators about pending legislation or regulations. It should not be considered synonymous with advocacy because there is much more advocacy people and nonprofits can do than is the case with lobbying.

Advocacy for individuals. Client advocacy is often carried out in the social work and legal services fields. Occasionally, the case of one person can lead to a broader advocacy effort about the rights of a population or community. Efforts to secure food stamps for a family or advocacy for an immigrant's rights are examples.

Advocacy on behalf of a field-specific issue. Advocacy efforts are most often focused on a specific population or cause. Examples include groups like AARP advocating for Medicare-coverage for prescription drugs (advocacy on behalf of seniors). Another example is environmental organizations advocating for regulations requiring 'brownfield' cleanup by corporations (advocacy on behalf of geographic, often politically and economically disadvantaged, communities).

The word advocacy is often used interchangeably with related words such as lobbying and education. An outsider is not certain whether they mean engaging in public policy, or advocating on behalf of clients or their mission in other ways.

ADVOCACY MATRIX

The Focus and Types of Advocacy Efforts

	Advocacy for individuals:	Advocacy on field population, or cause-specific issues:
Public Education	Efforts by the Miami family and representatives of Elian Gonzales to advocate for him to be allowed to remain in the United States, rather than returning to Cuba.	Paralyzed Veterans of America's educational efforts to raise public understanding and support for disabled veterans.
Research	Research conducted to prepare an attorney, social worker or other advocate to fight for a family's right to housing or public school accommodations.	The Center on Public Policy Priorities in Austin, TX conducts research on how the changes in welfare laws affect the economic conditions of low-income families.
Accessing Public Information	A caseworker that uses state Medicaid information to determine the eligibility of a family for health insurance.	The Center for Health, Environment and Justice uses the EPA's Toxics Release Inventory to stay up-do-date on pollution by companies.
Administrative Advocacy	A caseworker at Northern Virginia Family Service urges a local high school to provide accommodations for a child with a disability.	When Urban Edge community development corporation advocates for a small businesses façade improvement program with the City of Boston's Department of Economic Development.
Judicial Advocacy	When a court-appointed special advocate assists a child in an abuse case to prepare testimony.	When the National Right to Life Committee files an amicus curiae or "friend of the court" brief advocating the pro-life position in cases before federal and state court.
Legislative Advocacy & Lobbying	When a family or organization urges their U.S. Senator or Representative to introduce legislation recognizing the valor or societal contribution of a family member or individual.	When the Missouri Coalition Against Domestic Violence urges the state legislature to enact tough penalties for batterers and provide transition assistance for abused families.
Voter & Candidate Education	When a 501 (c)(4) nonprofit, such as the Sierra Club, endorse candidates for elected office.	When local chapters of the American Heart Association conduct nonpartisan candidate forums about a wide range of health issues.
Organizing & Mobilizing	When Lois Gibbs and the Love Canal Homeowners Association organized and advocated for the families in their community in Niagara, NY to be moved from the polluted land and water in their neighborhood.	When Mothers Against Drunk Driving organizes hundreds of families to advocate at state capitols for stricter laws pertaining to alcohol and driving.
Public-Private Collaborations on Advocacy Efforts	Joint efforts of nonprofits and corporations to increase the number of H-1 visas to allow persons with special skills to accelerate their immigration process.	United Way of Massachusetts Bay and Bank Boston lobbied together to advocate for the funding for the Success By Six program in MA.

Endnote:

The types of advocacy activities are from Democracy At Work, Nonprofit Use of Internet Technology for Public Policy Purposes, OMB Watch, 1998.

Advocacy in the self interest of an organization:	Advocacy for the interest of the nonprofit sector:	Advocacy on behalf of broader social and economic policy:
A local community health clinic educates the residents in their neighborhood about services they would provide if they were to receive a portion of the state's tobacco settlement funding.	The Colorado Association of Nonprofit Organizations holds a Nonprofit Day for the public to recognize the work of nonprofits around the state.	The efforts of the National Organization for Women to educate the public, leading up to the World March for Women 2000 on October 15, 2000, calls for policies such as equality between men and women and ending violence.
A nonprofit senior housing organization with an adult day health program develops research showing that its dementia-specific program deserves a higher Medicaid rate.	When the North Carolina Center on Nonprofits demonstrated, through research, the positive effect on charitable giving which came from establishing a state tax credit incentive.	Public Citizen's research on global trade policy discusses the extent to which those agreements are decided in a democratic manner.
Many nonprofits use bill-tracking websites to make sure they know the status of the appropriations bills that fund their programs.	Organizations working to defend nonprofit advocacy rights gather data from IRS databases containing lobbying expenditures by charities.	Nonprofit organization that advocates for the ending of poverty uses the databases of the U.S. Census to keep track of where poverty is located and the density of the homeless population.
When So Others Might Eat in Washington, D.C. advocates for an increase in direct payment from the D.C. government for their homeless services.	When the Maryland Association of Nonprofit Organizations advocates for exemption from energy and fuel taxes before the Mayor of Baltimore.	When the Family Research Council advocates with the Clinton Administration for human rights to be a criteria in global and domestic policy.
When the Boy Scouts of America defended their position before the Supreme Court regarding the eligibility of gays in the Boy Scouts.	While court cases affecting the entire nonprofit sector are quite significant, they are also infrequent. It is likely that issues related to fundraising, advocacy and commercial activities will be argued in courts as controversial cases arise.	The NAACP's litigation efforts in Brown v. Board of Education of Topeka to overturn the "separate but equal" policy of Plessy v. Ferguson that led to subsequent court decisions on civil rights in the 1960s.
When a state mental health coalition lobbies for an increase in state funding for community mental health centers.	When the Minnesota Council of Nonprofits lobbied successfully for legislation that would create a new state-level tax incentive for charitable giving.	When nonprofits advocated different positions on a recent bill in Congress to repeal the estate tax based on views about progressivity in tax policy.
When the Colorado Association of Nonprofit Organizations educated voters about why they should vote "no" on an initiative to strip tax-exemption from nonprofits in 1996.	When Independent Sector educates the presidential candidates about key issues facing the nonprofit sector during a presidential campaign.	When AARP and many other senior advocacy organizations advocate for candidates and the voting public to protect.
When the Massachusetts Council of Human Service Providers organized a lobby day at the state capitol to advocate for cost of living increases for nonprofit employees under state human services contracts.	When the California Association of Nonprofits successfully organized the nonprofit community to fight Proposition 226, the "paycheck protection" ballot measure that would have threatened nonprofit advocacy rights.	When the Children's Defense Fund, YWCA, and many other groups organized the Stand for Children rally on the Mall in Washington, D.C. in 1996.
Public charities and the realtors' associations worked in coalition to protect key tax deductions when Congress was considering flat tax legislation.	Nonprofits and telecommunications companies coordinated efforts to find common principles in telecommunications reform efforts in 1994 under the leadership of Independent Sector.	The Coalition for Environmentally Responsible Economies' principles calling for energy conservation, sustainable resource development and other key environmental reforms. Nonprofits and major corporations have signed on to these broad principles.

Self-interest
advocacy by a
nonprofit might be
an effort to secure a
line item in its
state's budget for a
program it provides,
such as a residential
housing facility for
the homeless.

Advocacy in the self-interest of your organization. Self-interest advocacy by a nonprofit might be an effort to secure a line item in its state's budget for a program it provides, such as a residential housing facility for the homeless. Other examples might be advocating for your own organization's bid to secure a government grant or contract or to participate in a public planning commission created by the mayor or city council.

Advocacy for the interests of the nonprofit sector. Examples include lobbying and educating government officials to protect the property or sales tax-exemption for nonprofits in a state or city. Lobbying to defend against attacks on advocacy rights such as the Istook Amendment, or to increase federal or state tax incentives for charitable contributions (such as proposed in the Charitable Giving Tax Relief Act promoted by Independent Sector) are other examples.

Advocacy on behalf of broader social and economic policy. Examples include advocacy for campaign finance reform, a living wage, increased racial tolerance, and fundamental changes in our tax system or for human- and workers-rights in debates over global trade policy.

The matrix provides a framework for the understanding of advocacy (individual-to-societal) in relation to the modes of advocacy most often employed (e.g., legislative, judicial).

Obviously, advocacy efforts often overlap these categories. When a nonprofit lobbies for increased appropriations from the state legislature for services it provides, its effort benefits its own programs but also the field of organizations that provide similar services.

David Arons is formerly co-director of Charity Lobbying in the Public Interest a national organization in Washington, DC that educates nonprofits about how to engage legally and effectively in the public policy process. He is also the co-author of a recent book, *A Voice for Nonprofits*.

Copyright 2000. All rights reserved by Third Sector New England, Boston, MA. (Volume 7, Issue 2). The *Nonprofit Quarterly* features innovative thinking and management practices in the nonprofit sector. For reprint permission or subscription information please go to www.nonprofitquarterly.org/subscriptions.

Framing Social Policy

by William A. Gamson

POLICY CONTROVERSIES INEVITABLY INVOLVE BATTLES OVER MEANING. THINK OF them as framing contests. On most issues, there is typically a conventional, dominant frame that most people use without thinking since much of it is taken for granted. Controversy is created when one or more challengers offer an alternative way of framing the issue. These challenges often come from the non-profit sector.

There are three principal meanings of “frame” in the English language, the first two of which apply here. The first, as in a picture frame, is a rim for encasing, holding, or bordering something, distinguishing it from what is around it. A frame, in this sense, specifies what is relevant and what is not. A second meaning, as in a building frame, is a basic or skeletal structure, designed to give shape or support. The frame of a building, covered by walls and insulation, is invisible once construction is completed. Although we don’t actually see it, we can infer its presence in the finished product from its visible manifestations.¹

As a social science concept, both of these meanings apply. Issue frames call our attention to certain events and their underlying causes and consequences and direct our attention away from others. At the same time, they organize and make coherent an apparently diverse array of symbols, images, and arguments, linking them through an underlying organizing idea that suggests what is at stake on the issue. Framing deals with the gestalt or pattern-organizing aspect of meaning.

Nonprofit organizations must come to terms with the dominant way of framing the issues that concern them. Accepting the dominant frame is every bit as much of a political act as advocating an alternative frame—it is an act that reinforces the status quo. Following is an example of how a coalition of nonprofit organizations succeeded in challenging and reframing the news media coverage of an incident in Boston.

In September 1998, Boston newspapers ran stories about an incident which the *Boston Herald* headlined as “Babysitter, 15, Charged in Tot’s Death” and the *Boston Globe* as

Nonprofit organizations must come to terms with the dominant way of framing the issues that concern them. Accepting the dominant frame is every bit as much of a political act as advocating an alternative frame—it is an act that reinforces the status quo.

In addition to identifying the appropriate message, the group discussed interrelated the issue of access strategy: How could they maximize their chances to obtain coverage of their message regarding Raheem's death?

"Babysitter Accused of Killing Boy, 2." Two-year-old Raheem Dixon had died from internal bleeding, allegedly punched or kicked by his babysitter, a 15-year-old boy. Raheem's mother, 27-year-old Sophia Dixon, fearing a pending welfare cut-off, had taken a job. She had hired the teenager to watch her son after a long and fruitless search for childcare. The details of the case study that follows are taken from a paper by two Media Research and Action Project (MRAP) colleagues, Charlotte Ryan and William Meinhofer, "Passive to Active Voice: Participatory Action Research and the Expansion of Media Democracy."

Sophia Dixon and her three children lived in an area served by the Franklin Field-Franklin Hill, Dorchester Healthy Boston Coalition (hereafter, "the Coalition"), an alliance of 13 groups serving a large, predominantly African-American section of Dorchester. The victim's mother initially refused to talk to reporters and is barely mentioned, if at all, in the articles that first appeared. Some of the articles refer to a Department of Social Services investigation of an earlier complaint of abuse and neglect, noting that the DSS found the charges to be "unsubstantiated." The focus of the articles was on the 15-year-old eighth grader who was to be tried as an adult under a 1996 Massachusetts law covering juveniles over age 14 charged with murder.

The incident highlighted the difficulties that the Coalition encountered as it tried to assist people in dealing with the consequences of welfare reform. The initial media reports simply assigned blame while ignoring the larger issues raised by the incident. As Ryan and Meinhofer put it, media coverage had "disassociated the event from the daycare crises rampant in poor communities as the state forced welfare mothers into the workplace without providing adequate child care supports."

The Coalition decided to challenge the emerging media coverage. In Massachusetts, welfare reform had produced one of the more restrictive programs in the nation while at the same time putting few services in place to support the thousands of welfare recipients being hustled into low-wage jobs. According to Ryan and Meinhofer, single mothers on welfare were arriving in the workforce in increasing numbers without adequate childcare. "In short, Sophia Dixon was not a rarity. More families would suffer if the state did not address the need for state-subsidized quality childcare. The . . . Coalition saw an opportunity to place Raheem's tragic death in the context of the existing structural problems with Massachusetts' welfare reform."

The Coalition pulled together a working group ("media caucus") that included Coalition staff, three MRAP staff members, Raheem's family, neighborhood social service providers, and resident leaders of the public housing development including a grandmother working to establish training for family day care providers. Over the next two months, the Coalition implemented a successful media campaign that challenged the dominant framing of the incident, reframing it as a crisis in the provision of childcare.

In addition to identifying the appropriate message, the group discussed interrelated the issue of access strategy: How could they maximize their chances to obtain coverage of their message regarding Raheem's death? The group identified a journalist who was interested in examining the story in context. As Ryan and Meinhofer recount, "Over the next six weeks, she researched the incident itself, welfare reform, and childcare reform, and struggled with two supervising editors at the *Boston Globe* about how to pitch the

story. She ultimately was able to tell the mother's story and frame it within the bigger picture of welfare reform and the state's inadequate support for childcare."

The headline of the article reflected the change in framing: "Welfare Reform: What Happens to the Children? Reliance on Informal Care Dangerous, Some Say." And the initial paragraphs provide vivid illustration of how a case like this can be used to influence the dialogue around policy issues.

Until this fall, Sophia Dixon was on the verge of becoming a symbol of welfare success, following a path laid out by the state's landmark welfare reform law: After six years on public assistance, she had found a job, a babysitter, and her independence.

"Now, however, after her two year-old-son, Raheem Dixon, was allegedly beaten to death by his 15 year-old babysitter, Dixon's case is being held up as a symbol of the potential brutality of welfare reform" (Robertson, *Boston Globe*, December 27, 1998).

The above example involves reframing a particular event but it was part of a broader effort aimed at changing the way people think about issues of social policy. The campaign opened space in the public debate around welfare reform in Massachusetts. On an institutional level, the Coalition built their own ties to the area's newspaper of record, the *Boston Globe*, meeting several reporters, and developing a strong working relationship with one of them.

More generally, the example demonstrates how nonprofits, especially when working in larger coalitions, can successfully challenge dominant frames and provide alternative ones that further their policy agenda. The Coalition was seeking what many progressive policy organizations seek: recognition that the provision of an appropriate human service was not merely a private responsibility but a public one as well.

Choosing an alternative frame involves facing a dilemma of how broad or narrow the challenge should be. If the alternative is too narrow, it makes fundamental changes virtually impossible by accepting so many assumptions about the status quo that only incremental changes at the margin are possible. On the other hand, frames that challenge fundamental assumptions—even when the challenge is well-deserved—run the danger of being marginalized and not taken seriously by the media and, as a result, by the major players in the policy arena. Unfortunately, there is no formula for finding a path through the dilemma but there are enough successful challenges and reframing efforts to offer encouraging models.

If you want to think more about how you might use the framing approach in your own work, how would you answer the following questions:

- What is the dominant framing of the issues that my organization is most interested in?
- What is the preferred frame of my organization and how is it different from the dominant frame?
- What other organizations share this preferred frame?

Endnote. 1. The third meaning, irrelevant for our usage, is to rig evidence or events to incriminate someone falsely.

About the Author. William A. Gamson is a professor of sociology and co-directs the Media Research and Action Project (MRAP) at Boston College. He is the author of *Talking*

More generally, the example demonstrates how nonprofits, especially when working in larger coalitions, can successfully challenge dominant frames and provide alternative ones that further their policy agenda.

Choosing an
alternative frame
involves facing a
dilemma of how
broad or narrow the
challenge should be.

Politics (1992) and *The Strategy of Social Protest* (2nd edition, 1990) among other books and articles on political discourse, the mass media, and social movements. He is a past president of the American Sociological Association.

Suggested Resources

For a fuller discussion of the concept of framing and suggestions and materials on how to apply it, see Charlotte Ryan, *Prime Time Activism*, Boston: South End Press, 1991.

For more about Boston College's MRAP and its approach to using the media for social change, see Charlotte Ryan, Kevin M. Carragee, and Cassie Schwerner, "Media, Movements, and the Quest for Social Justice," *Journal of Applied Communication Research* 26 (1998), pages 165-81.

To order a manual that applies this approach to the issue of domestic violence, write to Karen Jeffries, Rhode Island Coalition Against Domestic Violence, 422 Post Road, Suite 202, Warwick, RI 02888. Phone: (401) 467-9940; e-mail: ricadv@ricadv.org. Ask for "Domestic Violence: A Handbook for Journalists." Cost: \$25.

Copyright 2000. All rights reserved by Third Sector New England, Boston, MA (Volume 7, Issue 2). The *Nonprofit Quarterly* features innovative thinking and management practices in the nonprofit sector. For reprint permission or subscription information please go to www.nonprofitquarterly.org/subscriptions.

Separate, We Lose

by Pablo Eisenberg

THE PROBLEM OF FRAGMENTATION HAS CHARACTERIZED THE NONPROFIT WORLD FROM ITS very beginning. As the sector has grown at a dizzying pace in recent years, the virus of separateness has become more deadly, dividing ostensibly related fields of activity from one another, narrowing the vision of old and new organizations alike, and paralyzing the potential of unified action on major public issues of the day.

In simpler times, when our economy was much less complicated, our population much smaller and less diverse, and our nonprofits comparatively few in number, single organizations or initiatives could and did have an enormous impact on American society. The grange movement, with some 20,000 local chapters, played a major role in developing rural policy, leading to the creation of the rural extension service. The Townsend Clubs, which at one point numbered as many as five million members, were largely responsible for the 1936 passage of the Social Security Act. During the aftermath of World War II, the American Legion successfully lobbied the Congress to launch the GI Bill offering education benefits to returning veterans.

Today, only a handful of our several million nonprofits exercise such a disproportionate influence on the politics of our country (the National Rifle Association, AARP, and the Christian Coalition come to mind). The paradox of our current nonprofit sector's huge growth is that its very size has rendered it weaker, not stronger. The larger it has grown, the more splintered and divided it has become. Its leadership, responding to the pressures of one-issue constituencies and narrowly targeted financial support, has abandoned broad organizational vision for organizational mission.

Except in rare cases—such as the nonprofit sector's fight for self-preservation against the Istook Amendment's threat to first amendment rights—nonprofits have demonstrated their inability to win on major issues in the public interest such as strong gun control measures, national health insurance for all Americans, campaign finance reform, increased payout requirements for foundations, and affordable housing for low income residents. Our many organizations, large and small, find it difficult, if not impossible, to join in a common cause beyond the immediate self-interest of their individual nonprofits. Why should this be the case?

The paradox of our current nonprofit sector's huge growth is that its very size has rendered it weaker, not stronger.

America's growing culture of celebrity and the star system has also undermined the nonprofit sector's capacity for cooperation and collaboration.

Narrowing Nonprofit Focus

During the past 40 years, a vast number of new nonprofits have come into being, reflecting new social issues, subject areas, populist movements, ethnic and gender concerns, and political developments. The very large majority of these have been focused on one or two issues, not on broad-based problems of our society. Whether their priorities were health, education, gay rights, the environment, or consumerism, such organizations have attracted boards of directors with interest in and passion for their particular issue. The leaders chosen by these boards to run their organizations have tended to reflect their own predilections. It is not surprising that the organizations' missions, for the most part, have been narrow. Staff leadership has been rewarded for its adherence to limited organizational goals, not to broader objectives.

Philanthropic practices have reinforced this narrowness, helping to keep nonprofit organizations in their program and policy silos. Categorical or special project grants are the mainstay of foundation funding. In 1997, only a little more than 13 percent of all the money distributed by foundations went to general operating support. Education groups are encouraged to run strictly education projects, community development organizations to operate exclusively housing and commercial deals, and social service groups to focus only on their assistance programs. All these financial incentives drive nonprofits to constrict their activities and vision. There is little money available for coalition efforts that can bring different constituencies and organizations together for joint action on major issues of common concern. For all their talk about the importance of cross-cutting issues, foundations prefer the safety and comfort of limited projects and initiatives that carry few risks.

America's growing culture of celebrity and the star system has also undermined the nonprofit sector's capacity for cooperation and collaboration. Too many nonprofit leaders behave like prima donnas, unwilling to share either the spotlight or credit for their organizations' success. These leaders serve as their organizations' sole spokesperson; they are the ones who testify before the legislatures and they build their communication units around themselves. While such ego-building destroys organizational team spirit, these leaders nevertheless are rewarded for their behavior by their boards and donors and by the publicity they generate. Is it any wonder that they are reluctant to participate in coalitions and collaborations that depend on partnership and shared credit? Some of them actually come to believe that they and their organizations can win major policy battles by themselves. Recent nonprofit history is the story of battlefields littered with the bodies of these lone wolves.

Obstacles

Despite the many obstacles we face in overcoming fragmentation, there have been a number of successful coalitions in recent years. Yet it is much more difficult today to form a powerful coalition than it was 20 years ago. Back then, it was possible to convene 40 organizations—35 of which would be regularly represented at meetings by their executive directors. The other five representatives would be high level executives with the authority to speak for their organizations. Today, in a similar situation, one could expect only eight or ten of

the organizations to be represented by their CEO and the remainder would consist of mid-level staff and interns with no authority to make an organizational decision. For a number of reasons, coalitions appear to be less of a priority to nonprofit leadership than was the case two decades ago. While many nonprofit leaders stress the significance of coalitioning, few are either serious about or adept at creating and maintaining coalitions.

Nonprofit organizations focused on poverty know that affordable housing, poor health conditions, crime and drugs, under-performing schools, and the lack of social services are all interconnected and inseparable. Yet, their activities don't reflect this understanding. If, for example, the organizations are health groups, they tend to spend little or no time on affordable housing or educational problems. The same is true for other organizations. When affordable housing issues were being legislated in the Congress, few non-housing nonprofits lent their active lobbying support. Similarly, housing organizations were not active supporters of health or children's organizations when the former's legislative measures were being considered. The inability or unwillingness of some nonprofits to lend a hand to colleague institutions is a major reason why anti-poverty efforts in recent years have not been sterling.

Continued violence in our urban and suburban areas and an irresponsible electoral system are two of the most serious obstacles to the development of a democratic civil society. The former stunts the healthy growth of our cities, casts a pall on our schools, and creates a sense of insecurity everywhere. The latter has produced political leaders indebted to big money and special interests, unresponsive to the public interest.

Most nonprofits have a vested interest in the resolution of both problems. Why, then, have we not yet passed serious gun control measures or campaign finance reform? Many nonprofits would be prepared to devote a part of their agendas, maybe a substantial part, to a campaign focused on tackling both challenges. When I was executive director of the Center for Community Change, a national organization providing technical and advocacy assistance to low-income grassroots organizations, the Center either took the lead or participated significantly in a number of coalitions tackling important social issues. Yet, the Center was never asked by gun control groups or by electoral reform organizations to lend support to their causes, or join a coalition under their leadership. Knowing how crucial these two issues were to our mission, we would have been happy to spend some of our resources in helping resolve these problems. Numerous other nonprofits would have been similarly inclined. They were never asked.

As long as this state of affairs permeates the sector and fragmentation continues to increase, nonprofits will harvest their own little gardens, score some notable victories here and there, but remain incapable of resolving the big issues that impede our march toward greater economic and social justice. Can we do something about this? What steps can our nonprofit organizations, philanthropic institutions, and universities and colleges take to remedy the situation?

Funders' Opportunities

First, foundations must begin to alter the way they do business in order to meet our civil society's most urgent public needs. There is no reason why foundations cannot give more of their money for general operating support—what all nonprofits need and want. Flexi-

As long as this state
of affairs permeates
the sector and
fragmentation
continues to
increase, nonprofits
will harvest their
own little gardens,
score some notable
victories here and
there, but remain
incapable of
resolving the big
issues that impede
our march toward
greater economic
and social justice.

The leadership of nonprofit groups, including their boards, also has a responsibility for engaging in the big issues that transcend organizational missions and self-interest.

ble funds would permit charities to join and financially support coalitions and policy campaigns from their own budgets, something that many groups currently find impossible to do.

Foundations, including those that are reluctant to depart from their emphasis on special project funding, could set aside a special pot of money reserved for crosscutting policy efforts and building coalitions. Not only would this development signal to donees the importance of a broad vision and unified action, it would also provide a financial incentive to organizations concerned that coalitions will take funds away from potential member groups. Unfortunately, the avoidance of risk-taking, policy and advocacy efforts, and coalitions has been the hallmark of mainstream foundations. Is it not time that the heads of these foundations begin to exercise their leadership on behalf of a more effective, less fragmented, nonprofit sector?

The leadership of nonprofit groups, including their boards, also has a responsibility for engaging in the big issues that transcend organizational missions and self-interest. So-called “umbrella” organizations, management support, and technical assistance groups and associations of nonprofit professionals need to shift the focus of their concerns and conversations. Discussions of management techniques, improved technology, increased professionalization, methods of technical assistance, and better personnel policies are important, but they are only a part of nonprofit life. The dialogue needs to be enlarged to embrace the policy and advocacy issues that are at the heart of our democracy and civil society. We require better administrators and technicians, but we need nonprofit leaders and visionaries even more. We should develop excellent program specialists, but there is an even greater need for coalition-builders. When honors and awards are conferred to outstanding nonprofit leaders, the criteria for this recognition should be not what they have done for their organizations, but what they have contributed to the sector and our society.

Devolution is transferring much of government and nonprofit action to the states and localities, yet many national and regional nonprofit groups do not reflect this new configuration. Instead of building their local membership bases, they continue to run as centralized, professionally run lobby groups, with membership involvement limited primarily to financial contributions. Left to themselves, many nonprofit professionals tend to become specialized, comfortable in routine, limited in vision. Strong, active nonprofit membership bases, such as those of Common Cause, Gun Control, Inc. or the NAACP, provide the best chance for broader approaches to our social problems. If wars are too important to leave to the generals, then our social problems are too crucial to leave to our nonprofit professionals.

For our universities and colleges, there is a special challenge: the education of broad-gauged, visionary leadership. The institutions have not yet met that challenge. Too few of our academic centers of philanthropy, nonprofit management, and public policy studies are conducting programs that lift their students' sights, enhance their coalition-building skills, and nurture their courage and integrity. These centers need to develop leaders, not just program analysts, managers, and technicians.

The nonprofit world cannot afford to sit back and passively accept the growing frag-

mentation of the sector. Foundations, nonprofits, and institutions of higher education must unite to overcome this debilitating condition. Let this effort begin now.

About the Author. **Pablo Eisenberg** is a senior fellow at Georgetown University's Public Policy Institute. He served for 23 years as the executive director at the Center for Community Change, a national technical assistance and advocacy organization serving low-income community groups throughout the country. One of the founders of the National Committee for Responsive Philanthropy, he remains on its board and sits on the board of eight other nonprofit organizations.

Copyright 2004. All rights reserved by Third Sector New England, Boston, MA (Volume 11, Issue 2). The *Nonprofit Quarterly* features innovative thinking and management practices in the nonprofit sector. For reprint permission or subscription information please go to www.nonprofitquarterly.org/subscriptions.

If wars are too
important to leave to
the generals, then
our social problems
are too crucial to
leave to our
nonprofit
professionals.

Essentials for Advancing Nonprofit Advocacy: Board Leadership

by Marcia Avner

A strong advocacy program can aid in changing the basic rules and resources for nonprofits and their communities.

“Most nonprofits (58%) identify the executive director as having responsibility for government relations or public policy. And the executive director is perceived as having the most influence regarding decisions concerning government relations. Yet organizations where the executive director has responsibility for public policy are less involved in public policy than organizations that assign responsibility to others.

Organizations most involved in public policy—whether testifying before a legislative or administrative hearing, lobbying on behalf of or against a proposed bill or other policy pronouncement, encouraging members to write, call, fax or email policy-makers, or releasing research reports to the media, public, or policy-makers—have staff, a board committee or an outside lobbyist assigned the responsibility for public policy.”

—Strengthening Nonprofit Advocacy Project (SNAP) Report

Editors’ Note: This article is adapted from a recently published book entitled *The Board Member’s Guide to Lobbying and Advocacy*, by Marcia Avner.¹ As other articles in this compendium emphasize, advocacy is a core activity for nonprofits that we ignore at our own risk. Our boards are a potentially powerful and greatly underused resource for advocacy.

THE EVIDENCE AND OUR INSTINCTS ARE CLEAR: BOARD INVOLVEMENT MAKES nonprofit advocacy more effective. So how do we tap this source of power more consistently and sustainably? In the continuing discussion about what the work of nonprofit boards ought to be, there is a marked lack of attention to the board’s role in helping to maintain a reasonable public policy environment in which the nonprofit can do effective work. Board involvement in advocacy is one area that shapes the context for all other nonprofit activity. The majority of a board’s activity will likely be reactive to a situation predetermined by others. A strong advocacy program can aid in changing the basic rules and resources for nonprofits and their communities.

The potential is great and the opportunities seem obvious. So why aren't more board members involved in advocacy and lobbying? Nonprofits need the leadership, wisdom, talents, and connections of board members in advocacy activities, but more often than not, it is still the staff and program participants who meet with legislators, political appointees, and the press.

In the current context, both in terms of public policy on substantive issues and in terms of our regulatory environments, we can't afford to waste the advocacy potential of boards—but how to start? The short answer is that you must be intentional in your plan for board involvement. If your board does not have a history in advocacy, a full range of tools for building board involvement needs to be tapped to recruit, excite, train, involve, inform, and applaud board engagement. But first, examine what your board's involvement can mean to your organization—envision the best-case scenario. Write out roles and responsibilities so that you have explored the possibilities and are prepared to tap this invaluable resource, and recruit current and future board members who add value to your advocacy efforts. Here is one board member's story of turning the personal into the political.

Bill Sellers' Story

Sellers is a board member of the Arc of King County, Board Member at Large of the Arc of Washington State.

"Having a daughter with Down syndrome let me into the field of public policy work. I became a board member of Arc of King County because I wanted to make sure that my community had the services and opportunities my daughter needed. And I felt I might as well lobby for all individuals with developmental disabilities at the same time I was advocating for her needs. Arc's introduction of Citizen Lobbyists and Self-Advocates as vehicles of advocacy to legislative bodies has proven to be incredibly valuable.

"When the Citizen Lobbyists of the Arc successfully lobbied for funding that provides employment and training in the transition from high school to work (Education for All), my daughter benefited; she was taught in integrated settings and has been employed for 12 years as an office assistant in the corporate headquarters of a large natural food cooperative where she works 24 hours a week. Her income allows her to live rather independently in shared housing with four other young adults who have different developmental disabilities. The funding that we lobbied for also created a whole group of working taxpayers whose jobs and incomes pay for their housing, clothing, healthcare, transportation, continuing education, and leisure activities.

"The experiences I've had in public policy have proved to me over and over again that a handful of people can make a tremendous difference. After all, it was four mothers and one law student who brought Education for All (now called IDEA) to our nation."

This story illustrates how board members can be key players—as organizational and community leaders—in shaping nonprofit policy work. They can be the sector's strongest voices because of the fact that they are committed volunteers. In the case of boards who include constituents as members, they speak not only from personal experience but also

If your board does not have a history in advocacy, a full range of tools for building board involvement needs to be tapped to recruit, excite, train, involve, inform, and applaud board engagement.

How can we begin
to build new board
involvement while
expanding the roles
of board members
already fully
engaged in
advocacy?

from an organizational base that exhibits concern for the larger community of those affected by the issue at hand. Unfortunately, however, board leadership in nonprofit advocacy is still the exception rather than the rule.

How can we begin to build new board involvement while expanding the roles of board members already fully engaged in advocacy?

As with any campaign, those working to engage boards in advocacy need to consider key questions:

- What is the opportunity?
- What are our goals?
- What are the problems and barriers?
- Who makes the decisions and how can we influence them?

The Opportunity

Board members are obvious resources for a strong advocacy program for the following reasons:

- Board members are community leaders by virtue of the fact that they serve on a nonprofit board representing community interests.
- Board members may provide access to opinion shapers and decision-makers.
- Their volunteer status and dedication to a nonprofit's mission and goals, along with their commitment of time, resources, and service, make them an organization's most credible spokespersons.
- Board members are stewards and champions for the organization's work, involved in its mission, goals, strategies, programs, and possibilities. Advocacy is part of that role.
- As governors for the organization, board members are positioned to enrich strategic planning for policy work, set the direction for advocacy and lobbying efforts, and allocate resources for this component of nonprofit work. Without their leadership, public policy work might never be integrated into a nonprofit organization's plans and options.
- Board members use their networks to help build alliances and coalitions for nonprofit advocacy.
- Board members can be powerful messengers in legislative and administrative arenas.

Bill Malloy's Story

Malloy is a board member of the Center for Human Development.

"In December 2000, I joined the board of the Center for Human Development (CHD), an umbrella organization for over 72 human service providers in the Springfield, Massachusetts area.

"In spring 2001, board members of various human service organizations geared up to

advocate for government funding to increase the salaries of low-paid human service workers. We wrote letters and e-mails and visited elected officials to request increased funding. Although unsuccessful, the board members continued to meet and set goals. In 2002, during the state's budget crisis, we rallied to prevent funding cuts to programs. Our goal was to create a new emphasis on administrative reform. In fact, we have had so much success with this effort, we've brought the salary issue back into the forefront.

"I believe it has been extremely important that board members led these efforts, because in both cases it wasn't our jobs on the line. We could speak from the point of view of a community leader to tell officials what effect these issues have on our organizations and the communities we serve."

How Advocacy Boards Act

For nonprofits to fully integrate advocacy into their overall strategy for meeting their mission and to maximize clout, board members need to be engaged in meeting key governance and action roles.

In high-effectiveness mode, nonprofits will have boards of directors who:

- are instrumental in making public policy a priority for their nonprofit organization;
- decide issues and positions after fully consulting and engaging the constituency they represent;
- have a clear discipline for ensuring those constituencies are consulted and for ensuring they are engaged in creating and vetting advocacy positions;
- integrate strategic planning and advocacy conversations;
- lead and serve on policy committees;
- are key messengers to elected and appointed officials and their staff, as well as the media; and
- value advocacy as a strategy and work with staff to build capacity for advocacy for the long term.

On a broader scale, to maximize the effectiveness of nonprofit organizations we must have a voice at the key policy tables on the large and small issues that affect life in our communities and organizations. To ensure that this seat is reserved for us, we must have a whole-organization effort in nonprofits all across the sector—supported and peopled in part by active board members.

Barriers to Board Engagement in Advocacy

Why are so many board members reluctant to be a voice in the public policy dialogue? It seems safe to assume that anything that chills nonprofit advocacy overall influences the ways in which nonprofit board directors position themselves relative to advocacy and lobbying.

Findings reported by Jeff Berry and David Arons in *A Voice for Nonprofits* (Brookings

Why are so many board members reluctant to be a voice in the public policy dialogue? It seems safe to assume that anything that chills nonprofit advocacy overall influences the ways in which nonprofit board directors position themselves relative to advocacy and lobbying.

By understanding
what motivates and
inspires boards,
nonprofits can
expand board roles
and increase
activism.

Institution, 2003) show that governmental restrictions on lobbying not only create real limitations on a nonprofit's ability to advocate for issues and constituencies, but also that these restrictions have been excessively effective because nonprofits don't really understand them. Too many nonprofit staff and board leaders overreact to the 1976 Lobby Law limits by assuming that nonprofits are not allowed to lobby. Some fear that any public presence on an issue, any rocking the boat, will have a negative impact on their organization.

By contrast, it would be unlikely that the business sector would allow an opportunity to affect its own environment go untaken due to a lack of basic research on the real parameters of restrictions. More likely, they would find every way to push what they were allowed to do to the limit.

There are other inhibitors as well. A major study, the Strengthening Nonprofit Advocacy Project (SNAP), a survey of 1,700 nonprofits carried out by OMB Watch, Tufts University, and Charity Lobbying in the Public Interest, identified factors that motivate and factors that impede nonprofit involvement in policy issues. The chief barriers are stated to be:

- limited financial resources,
- limited staff and volunteer skills, and tax laws or IRS regulations.

In particular, organizations that received government funding revealed in the SNAP survey that they were particularly reluctant to participate in public policy, fearing retribution from their government funders. In addition, organizations that did not lobby reported that they perceived their reliance on foundation funding to be a barrier to advocacy.

Deciding the Board's Role

Each nonprofit organization determines what role advocacy will play in its plans for meeting goals. By understanding what motivates and inspires boards, nonprofits can expand board roles and increase activism.

In 2004, the Minnesota Council of Nonprofits worked with Professor Jodi Sandfort and a team of six students in the Master of Public Policy Program at the Hubert H. Humphrey Institute of Public Affairs at the University of Minnesota. They examined a fundamental question: what underlying forces drive board members of Minnesota nonprofit organizations to engage in advocacy efforts? Their findings are as follows:

- There needs to be clear definition of roles in strategic planning for advocacy, in shaping the policy agenda, and in engaging in advocacy and lobbying.
- A commitment to advocacy must be embraced by the entire organization.
- The goal of the organization must be to create an advocacy culture, a so-called "politicized collective identity," among the organization's board and staff, as well as in the sector as whole.
- A board member can be recruited, nurtured, or perhaps unleashed to serve as an advocacy catalyst leader, "the person who believes that advocacy is the right path for the organiza-

tion to take strategically to accomplish its mission and is willing to push others to do so.”

- Board members will be motivated, within a system of clearly defined roles and with the leadership of an advocacy catalyst leader, if the appeal is to personal values. Turning the personal into the political engages board leaders in advocacy.

In other words, board members often give of their time because they feel a values alignment with the organization and its work. They wish to be of use and to make a difference. The case needs to be made for nonprofit boards that an understanding of the organization’s environment and its advocacy opportunities actually provides boards with more information from which to make all planning decisions. It is part of good governance. A careful examination of the leveraging opportunities of successful public policy and advocacy work will motivate the board to integrate advocacy fully into its responsibilities.

Recommendations: Action Steps for Nonprofits

Board members and staff can begin now to accelerate engagement in public policy. It takes one person—board or staff—to start the discussion, build a collective awareness of the value of advocacy, and plan strategies for being an effective voice for issues that matter to your organization and the people you serve. Some steps to take:

- Recruit board members with interest, experience, and political savvy.
- Involve board members in policy planning and decision-making.
- Create a policy committee that enables your most interested and talented advocates—board, staff, and allies—to drive strategy and planning for your organization’s work.
- Create a Rapid Response Team, led by your key advocacy staff member and involving at least two engaged board members. This team makes decisions that have to be addressed in the high-pressure timelines that mark most national, state, and local legislative decisions.
- Listen to board members to determine their interest, their concerns, and the ways they are most likely to add value to your advocacy initiatives; find your shared priorities.
- Provide training on governance roles for advocacy, lobby law, and advocacy skills for board members. Tap local infrastructure organizations that have such training ready to go.
- Just do it. Ask board members to take specific steps, provide some guidance to coordinate strategy and message, and let them make the case for your causes.

And keep telling the stories that inspire board members and remind them that this is an important way to make a difference.

Rebecca Lynn Petersen’s Story

Petersen is the board chair of Minnesota Citizens for the Arts.

“There are many ways a board member can get involved in grassroots advocacy. As a

The case needs to be made for nonprofit boards that an understanding of the organization’s environment and its advocacy opportunities actually provides boards with more information from which to make all planning decisions.

“Some of the best
lobbying work can
happen in your local
café! It paves the
way for equally
important work at
the state capitol.”

—Rebecca Lynn Petersen
MN Citizens for the Arts

member of the Minnesota Citizens for the Arts board, I have had the opportunity to spend a lot of time at the legislature, especially on our annual Arts Advocacy Days. I have testified before the Senate Finance Committee and have had the opportunity to sit in the house chambers and casually chat with representatives while they were taking breaks or having their lunch. I believe that none of these efforts would have been so effective if I was not on a first-name basis with my local legislators.

“There was one occasion when Minnesota Citizens for the Arts had a statewide advocacy campaign for an important arts issue. Things were really heating up on a Saturday. I knew that one of our legislators always made a point of being available at the local café on Saturday. We needed to know the position the House was taking on this issue. So, on a cold winter Saturday morning, I ran over to the café and had a very important and rewarding conversation with our local representative. Some of the best lobbying work can happen in your local café! It paves the way for equally important work at the state capitol.

“It’s important to remember that our senators and representatives are also our neighbors, our community members, and our representation in state government. They can help us get things done, and we can help them get things done.”

Endnote. 1. Used with permission. Copyright 2004, Minnesota Council of Nonprofits. See: www.wilder.org/pubs/board_lobbying/ or call the Wilder Foundation directly at 800-274-6024.

About the Author. **Marcia Avner** is public policy director with the Minnesota Council of Nonprofits. Her work includes training, education and lobbying on issues that are important to nonprofits and the people they serve.

Copyright 2003. All rights reserved by Third Sector New England, Boston, MA (Volume 10, Issue 1). The *Nonprofit Quarterly* features innovative thinking and management practices in the nonprofit sector. For reprint permission or subscription information please go to www.nonprofitquarterly.org/subscriptions.

Advocacy by Design: Using Direct Media to Get a Direct Response

by Annette R. Duke

WE LIVE IN AN AGE OF MEDIA OVERLOAD. WE ARE BOMBARDED BY INFORMATION that is not especially useful or—and this is particularly true for nonprofits—is simplistically presented by reporters relying on canned press releases. But nonprofits have unlimited potential to break through this overload and reach their audiences through the strategic use of direct media.

Direct media is media that your organization produces and directly controls—you frame the message, you shape the content. It speaks directly to the audiences you want to reach—wherever they are. Its forms are endless—newsletters, brochures, church bulletins, posters, reports, fact sheets, videos, street theater, billboards, and Web sites are just some examples. And when it works, direct media has the power to influence: it connects issues and people, it helps people organize, it supports campaigns, it educates, it informs, it raises money, it documents, it gives people the tools they need to do their advocacy. And ultimately, it can prompt your audience to respond, to take action, or to have a change of heart.

As with any form of advocacy, direct media does not emerge out of thin air. It is not a one-size-fits-all solution. Effective communications demand that certain deliberate and strategic decisions be made regarding your audience, your message, and its distribution. On paper these decisions look linear but, in practice, the decision making process is fluid, never perfect, and never the same twice.

Name that Audience

Who are your audiences? And on which of these audiences should you focus? Once you can answer these questions you have made your first strategic decision. Here—at the moment of audience definition—you face the challenge of trying to name it and narrow it; you can no longer think of your audience as the amorphous general public, which is certainly too big and too diverse to reach effectively. But within the general public are the

As with any form of
advocacy, direct
media does not
emerge out of thin
air. It is not a one-
size-fits-all solution.

Most messages involve an intended action—what it is you are trying to achieve. The next strategic decisions are prompted by that action.

people you do want to reach. The more you can target that audience, the clearer the message will be and the greater the chances are that a direct media piece will elicit the intended response.

To determine what audience you want to reach, ask yourself these questions:

- If your campaign has an organizing goal, what is it? Who are the troops you are trying to organize?
- If your campaign has an advocacy strategy, who are the decision makers that have the power to make “it” happen, and what kind of direct media can be used as a tool to attract their attention?

Three Distinct Audiences for the Save the Brooke Amendment Effort

Several years ago, the Massachusetts Union of Public Housing Tenants (MUPHT) sought to educate public housing residents about the impending loss of the federal Brooke Amendment (landmark legislation that kept rents affordable). With assistance from the Massachusetts Law Reform Institute, they produced a single-page open letter to Congress, signed by public housing residents and the MUPHT President, Rosemary Rittenberg. This piece was distributed directly to public housing residents throughout the state. In Worcester, for example, resident leader Wanda Alvarado very effectively used the letter in a door-to-door campaign during which hundreds of residents also registered to vote—putting her tenant group in a strong position to influence their congressman.

Relying on this same letter, MUPHT and public housing leaders then turned their attention to educating the Massachusetts Republican decision makers (who were then the party in power), focusing particularly on Congressmen Blute and Torkildsen. At the same time, former Massachusetts Republican Senator Brooke, who in the late 1960s led the fight to pass the amendment, agreed to add his signature to the letter, which proved pivotal in solidifying Senators Blute and Torkildsen’s votes and in attracting sustained media coverage prior to a key national vote.

Finally, a national press conference was called to reach national legislators, during which Senator Brooke and three Massachusetts public housing residents—Wanda Alvarado, Paulette Turner, and Susan Bonner—presented an enlarged copy of the letter to Reps Blute and Torkildsen, with a request that they deliver it to the Republican legislators leading the charge to eliminate the Brooke Amendment. With advocacy efforts launched from numerous fronts and this full-court press coverage, the Republican vote was split—15 Republicans joined Reps Blute and Torkildsen, ultimately voting to save the Brooke Amendment.

Molding a Vibrant Message

Most messages involve an intended action—what it is you are trying to achieve. The next strategic decisions are prompted by that action. What is it that you want your audience to do? Attend a meeting or a hearing? Contact a legislator? Register to vote? Write a letter to the editor? Vote against or for a bill?

Once you know what you want to achieve, you must deliver a compelling message to your audience that moves them to take action. This is really an art. Laura Monroe, my col-

league, taught me to ask these questions: What keeps your audience up at night? What do they care about? What don't they care about? What stories can they connect with? What facts will get their attention? What do they read, watch, or listen to?

In the same way that you had to narrow down your audience, you need to prioritize what you want to communicate to them. What's the one message you want your audience to receive? What information, what words, what visuals about this one thing will attract their attention and make them retain it? I guarantee that you'll lose them with rhetoric, technical talk, and too many numbers.

And finally, get out of your office and test your direct media on members of your audience or on people who care about what you're doing. Critique is critical. What parts work? What parts don't work? What new ideas come up?

End of the Line: A Powerful Video Message

On September 23, 1997, the Massachusetts Law Reform Institute, with support from five nonprofit housing organizations, hired Ferrini Productions, a Gloucester-based video company, to film a line of thousands of people—some assembled before dawn—applying for subsidized housing. The goal was to document and make real for legislators what most of them had probably never seen—the incredible number of people waiting in line for housing.

Ironically, also on September 23, housing advocates had planned a Lobby Day at the Massachusetts State House to speak out for more affordable housing. Housing advocates saw an unprecedented opportunity to take advantage of these coinciding events. From 4:00 to 7:00 A.M., two camera people and four advocates interviewed and filmed people in line. This unedited tape was immediately sent to the State House and shown at 9:30 A.M. for the opening of Lobby Day. The immediacy of these two events became an important part of the message. That thousands of people were—at that very moment—vying for the state's limited housing resources, could communicate to legislators in a very tangible way the need for more affordable housing.

Phase two of the project involved shaping the three hours of footage into a short but compelling message that inspired our second audience—people who care about affordable housing—to spread the message by appealing to policymakers for help. After watching and listening to the rough footage several times, a team of four advocates—including two women who had actually been on line that day—identified two primary messages (in order of importance): 1) the increasing need for affordable housing and 2) the inhumanity of the process by which public housing was obtained. After countless hours developing a story board and editing the film, a 9-minute piece, was produced.

Preliminary screenings were conducted for legislative staff; former elected officials; lobbyists; homeless or formerly homeless people; public housing residents; church activists; housing and welfare advocates; and nonprofit housing developers. In response to their feedback, refinements were made. To date, almost 300 videos have been distributed. End of the Line has traveled from Congress to the U.S. Department of Housing and Urban Development to faith-based gatherings and beyond. It has been used as evidence in fair housing complaints. It has generated press coverage. And it continues to make what was invisible, visible.

In the same way that
you had to narrow
down your audience,
you need to
prioritize what you
want to
communicate to
them. What's the
one message you
want your audience
to receive?

You must always be asking the questions: Who is responding to a piece? Who else within this network or audience can be reached? What new audiences are there? And how can a piece be retooled to expand distribution?

Distribution

One hundred percent of a direct media piece's success is getting it into the right hands. If energy and staffing are not invested or fall off at the distribution stage, all efforts will be doomed. The piece will sit on a shelf or stay in its unopened box.

So, before designing the piece, you must map out a concrete distribution plan. Where is your audience? How will you get your materials into their hands or before their eyes or into their ears? And how can you make it credible and compelling enough to draw their attention? Will someone hand it to them directly or will it compete with all the other mail in the U.S. Postal system?

The delivery system will ultimately affect the type and design of a piece. A distribution strategy can also provide tremendous opportunities to enhance an organizing strategy and to expand one's network of partners. Finally, distribution must always (and constantly) be evaluated—uncovering new opportunities, new audiences, and new direct media tools. You must always be asking the questions: Who is responding to a piece? Who else within this network or audience can be reached? What new audiences are there? And how can a piece be retooled to expand distribution?

Case in Point: The Distribution of Housing Matters

Housing Matters is a national newspaper for the Public Housing Residents' National Organizing Campaign. Supported by the Center for Community Change in Washington, D.C., and produced by the Massachusetts Law Reform Institute with the help of resident leaders, the newsletter is an 8-page, tabloid-sized publication printed on newsprint. It has timely and informative material for residents about their rights, national housing policy, and organizing efforts around the country.

Published six times a year, *Housing Matters* has a print run of 40,000. The goal is to get it directly into the hands of residents. The Campaign's primary distribution strategy is to mail it—free-of-charge and directly from the printer on the day it is printed—to resident leaders and advocacy organizations across the country. Each leader receives as many copies as he or she can commit to distributing. Bulk orders range from 50 to 8,000. Local distribution systems include door-to-door delivery, and placement at resident meetings, libraries, offices of elected officials, health clinics, meals programs, and special events. Residents also distribute it to local reporters, housing authority commissions, and the politicians and policymakers they are trying to influence.

Immerse Yourself

Over the years, I have learned, often by trial and error, how to make direct media work; the development of skills did not happen overnight. Designers, writers, and strategists, whom I have sought out, have critiqued my work and helped me build my skills. Through their constructive feedback, and by absorbing the work of others, I have been able to learn at my own pace while doing work that is real. And with each new project there is always a new lesson to be learned. Reaching our audiences takes patience and immersion, but the potential to get one's message out and to effect change through media has made it a skill well worth pursuing.

About the Author. **Annette R. Duke** is a housing lawyer and runs a small, in-house publications unit at the Massachusetts Law Reform Institute, a statewide legal services support center located in Boston. MLRI joined with the Boston College Media Research Action Project in developing a multi-year Media Fellows Pilot Project, which seeks to build the capacity of underrepresented, grassroots groups to access mainstream media and to use direct media as an in-house media tool. **Charlotte Ryan**, Boston College Media Research and Action Project co-director, provided appreciated assistance on this piece.

Direct Media Checklist

Audience

- Who do you want to reach? And who, among these audiences, is the first audience? Be as specific as possible.
- What action do you want your audience to take? Be concrete. Be realistic.
- Who is your next audience? And what action do you want them to take?

Messaging

- What does your audience know and think about this issue?
- What messages will compel your audience to listen and to take action?
- What spokespeople have credibility with your audience?
And what can they say to support your message?
- What obstacles might prevent your audience from taking action?
And what would help them overcome these obstacles?
- What images tell a piece of your story or will support your message?
- Which images will make sense to your audience?
- Will any of these images alienate your audience?

Distribution

- How can you best deliver your piece directly to your primary audience?
- Does your delivery system support your organizing strategy?
If not, can you do it in a way that would?
- How does your distribution plan shape your piece (size, expense, timeline)?
Example: A piece to be mailed may need to be folded to letter size.

Excerpted from forthcoming *Making News: A Media Strategy Toolbox* published by Media Research Action Project at Boston College.

Over the years, I
have learned, often
by trial and error,
how to make direct
media work; the
development of
skills did not happen
overnight.

Copyright 1999. All rights reserved by Third Sector New England, Boston, MA (Volume 6, Issue 1). The *Nonprofit Quarterly* features innovative thinking and management practices in the nonprofit sector. For reprint permission or subscription information please go to www.nonprofitquarterly.org/subscriptions.

A Conversation with Eli Pariser: Online Fundraising and Engagement

by Ruth McCambridge

“Our basic theory has been that you engage people on the things that they’re passionate about and they will be happy to put their money and their time where their mouths are.”

THE NONPROFIT QUARTERLY’S EDITOR IN CHIEF, RUTH MCCAMBRIDGE, RECENTLY conducted an interview with Eli Pariser, executive director of MoveOn PAC (www.moveonpac.org) about MoveOn’s very successful approach to citizen engagement and fundraising. Although MoveOn now uses some advanced technology to support its operations, readers should note that just like many small organizations, it started with a single email and commitment to serve member interests and facilitate their involvement in issues of concern to them. In this model, online fundraising is just one of many pieces that comprise member involvement.

Ruth: Can you explain what MoveOn has done in online fundraising over the past two years?

Eli: Just about 99.9% of our fundraising has occurred online and it’s been remarkable. We have three separate organizations—the total raised by all those organizations over the last two years is more than \$60 million, and that comes from over 500,000 individual contributors. So an enormous grassroots base of concerned citizens has been able to translate their passion into money to support the causes that they believe in. Our basic theory has been that you engage people on the things that they’re passionate about and they will be happy to put their money and their time where their mouths are. But this is definitely not something that you can do disingenuously—it’s not something where you trick people into giving you money by pretending to engage them on issues. The way that you get that passion and the trust which is necessary for online organizing and for online fundraising is by serving people.

Ruth: And how do you determine that you are truly serving people—that you really have their pulse?

Eli: We listen very carefully. We listen to where our members are and what they care about and try to follow their lead in many cases by adopting the issues that our members are

most excited about. Not only is that where we find the most energy, but it's the best way of getting new people in and expanding our base.

Ruth: And how did you build your lists?

Eli: Entirely by word of mouth—by people sending messages to their friends and neighbors who send their messages on, and it happened organically over the course of six years. We have gone from one e-mail in the beginning to 2.9 million members now.

Ruth: And how do you determine that someone is a member?

Eli: We consider everyone who's on our list to be a member, and I think that's one of the interesting things about the dynamics we have with our membership. The typical dynamic is you send in 25 bucks and get a membership to the Sierra Club, for instance. We turned that on its head and established that anyone who wants to be a member can come and join and then if you feel well served and if you feel like we're offering you a compelling opportunity to make an impact through giving something, then you give.

Ruth: How do you view the relationship between giving and volunteering? Do you think that those are inextricably linked?

Eli: Well, to put it simply, I think that the more people do, the more they do. What we found interesting is that people who gave money also felt more compelled to get involved, giving some of their time also. The standard way of looking at this is that people have finite resources. I think that the pool of resources and energy and time the people are willing to bring to issues that they really care about is much deeper than it appears, and the way that you get at that is by asking people to step up—and to do so together. Also, I think it adds an important aspect when you do something with hundreds of thousands of other people. It has a whole different feel to it.

Ruth: What turning point surprises have there been along the way for you in developing this massive combination of human and financial resources?

Eli: Well, our first experience with this was when we were trying to raise \$60,000 to put an ad in the *New York Times* in our campaign to stop the Iraq war. We sent out a message saying we got \$30,000 and we needed a match. Overnight about \$400,000 came in—at first we thought it was an error in our database—and it was people giving \$10 or \$15—a lot of people. That was when we began to realize that people are really looking for opportunities to amplify their voices and their opinions, and when you offer them something like an ad that they can fund right now as a way of doing that, that's a very powerful thing. We tend to do our fundraising around concrete opportunities—it's not a "Help us fund MoveOn for the next five years" message. It's, "We want to put this ad on the air tomorrow, can you help us?"

Ruth: How has the management of these lists been? Has it been difficult?

Eli: I guess we think that "managing a list" is a narrow way of thinking about what we do. We try to think about who is there as a pool of people who are interested in getting

"We turned that on its head and established that anyone who wants to be a member can come and join and then if you feel well served and if you feel like we're offering you a compelling opportunity to make an impact through giving something, then you give."

engaged if it makes sense as an opportunity and is impactful and clear enough.

“A typical mistake that organizations make is they try to implement an online strategy with existing staff and existing structures and it just almost always fails.”

Ruth: There are a lot of our readers who are wondering what part online fundraising might play in their organization. Is there anything that you would say to people about the things they might look at in their own organizations before they even seriously consider trying to engage people in giving online?

Eli: Well I think that you have to approach it in a more holistic way than from the point of view of getting people to give online. You have to approach it from the point of view of developing a program to engage people online with what the organization is fundamentally about, and from that fundraising follows. It definitely flows in that direction.

Ruth: Any other words of wisdom that you want to give other organizations in the non-profit sector about your online strategies?

Eli: Sure. Just as a last comment, the thing that we found is the best way to actually do this work is to hire someone who truly gets it. The phrase we use is a “geek organizer”—someone who understands both how to get people involved in things and also how the technology works. A typical mistake that organizations make is they try to implement an online strategy with existing staff and existing structures and it just almost always fails. So finding and empowering the kind of the people who really have a passion for this particular kind of work has been the key to our success.

Ruth: And would you typify who those people are and where you can find them?

Eli: Well they’re often young, entrepreneurial people who have figured out unusual projects in the past. We look for people who have just done interesting things on the Web related to online organizing, because the depth of technical skill is really important. Also, you want people who don’t mind getting their hands dirty. This combination is not an easy thing to come by, but when you get it, it’s golden.

Copyright 2004. All rights reserved by Third Sector New England, Boston, MA (Volume 11, Issue 4). The *Nonprofit Quarterly* features innovative thinking and management practices in the nonprofit sector. For reprint permission or subscription information please go to www.nonprofitquarterly.org/subscriptions.

Becoming a Reliable Source: A Conversation with Rob Restuccia— Executive Director of Health Care for All

by Ruth McCambridge

WHEN THE BOSTON ASSOCIATION OF BLACK JOURNALISTS (BABJ) opened its 1999 Media Workshop, BABJ co-chair Zachary Dowdy, a reporter for the *Boston Globe* metro section, asked the crowd, “How many represent nonprofit organizations?” Almost every hand went up.

BABJ members working in national and local television, radio, cable, print, and digital media then proceeded to drive home the importance of developing a working relationship with the journalists who cover nonprofit issues in various workshops. They urged participants to be proactive; to familiarize themselves with the journalist’s daily schedule and to respect its constraints; to provide ample background material for stories; to prepare spokespersons well; and to offer feedback after stories are produced. To become a routine news source, the journalists were saying, be reliable. Make the journalist’s job easy.

Over the last 20 years, Rob Restuccia, executive director of Health Care for All, has become that reliable source for many journalists. With the support of his staff and a strong board, Restuccia has played a key role in putting the health care crisis on the public agenda in Massachusetts. His entrée into the media began when he was a union and community organizer; like many nonprofit leaders he knew little about the media. His media expertise was built exclusively via on-the-job training. We asked him to share some of the qualities he believes have enabled him to become a reliable resource for reporters.

Explain Issues from a Grounded, Day-to-Day Perspective

When I started working with reporters, I offered a day-to-day perspective in the reality of work and communities. Reporters are frequently searching for someone to articulate that. As a union organizer, I was very well grounded in how the health care system worked, from the points of view of both people at the bottom rungs of the hospital organization and the patients in the community.

When I started
working with
reporters, I offered a
day-to-day
perspective in the
reality of work and
communities.
Reporters are
frequently searching
for someone to
articulate that.

...if you enter this
work with cynicism
instead of a real
respect for the
people doing the
work, it will come
out in how you talk
about it.

We also took an analytical perspective on why events or trends were occurring in health care institutions, rather than a knee-jerk reaction. This analytical approach helped build strong contacts with reporters. On some level we were searching for the same set of answers as reporters, so they appreciated the information we shared. For example, in the early 1980s, private hospitals started dumping uninsured patients into Boston City Hospital. In highlighting this phenomenon, we weren't just grouching about it, we were trying to get to the root causes and find solutions for it.

Accept Reporter's Working Reality

On the whole, reporters are smart people. They're self-directed, motivated, ego driven—you have to understand their roles. There's no way you can lead them by the nose. What you're trying to do is develop a mutually respectful relationship. To be effective, it is important to understand and accept their limitations. They often face crazy deadlines and need to get the story in ten minutes or less. I'm not trying to change how reporters do their job, I'm doing the best I can in the context they present to me.

Also, reporters live in a competitive environment. Reporters are often thinking "Can I get an angle on this and pitch it in a way that will get me on the front page? Is this a story I can scoop someone on?" As you pitch stories, use this to your advantage.

Don't Get Frustrated

I sometimes feel that people who are working on social justice issues have a world view that inhibits them in working with the media. That view perceives the media as part of the problem. I'm not commenting on whether that world view is right or not, but if you enter this work with cynicism instead of a real respect for the people doing the work, it will come out in how you talk about it. Some people get very frustrated because reporters don't ever seem to "get it." I've never had that experience, nor that feeling. I've always felt there's a way to accomplish our mission, and if whatever we're doing isn't working we just haven't figured out how to accomplish it yet. Healthcare is an issue that has broad public appeal and therefore it makes our issues more attractive to the media. We can appeal to reporters in almost every section of the newspaper—metro, business, living and health-science—which gives us more opportunities to frame a story. For issues like welfare—it's pretty clear that it's hard to break through some of those stereotypes. On the other hand, I do think we're beginning to break some down and are making some progress.

Stay in Touch and Be Honest

I have no problem calling people and selling them a story, or selling them on an idea, or talking in general terms with them. I pitch a lot of ideas that never go anywhere. I think part of it is to just be understanding of their situation. So I'm happy to spend 45 minutes talking about a broad range of issues. I give people my home number and invite them to call me any time. If they have an issue and they want something, I'm at their service and will respond. Occasionally, I go to lunch and just talk over issues, but that usually occurs after I've established a relationship. My job is to represent a constituency that has been historically disenfranchised and on the bottom—their voices need to be heard. So it's important to stay in touch.

I would also add that I'm not guarded about what I say and I think reporters find that refreshing. To give you an example, I got a call last night from a *Wall Street Journal* reporter about a sale of a local insurance company. I knew enough about it to cover the basics, but I didn't know enough specifics to be helpful beyond giving her a quote or pointing her in the right direction. So I shared with her as much as I knew. I'm always careful not to pretend I know something I don't—you can get caught bluffing. I'm very clear when I really don't understand something.

Generally if you get something in the print media, it rebounds in the other media.

Print Media Tends to Rebound to the Other Media

I always feel like the print media drives the other media in the metro Boston market, so I tend to be involved with them more. The TV market has changed so dramatically over the last two years, I don't know exactly how to deal with it anymore. In the past, we had great reporters on Channel 5, Channel 4, Channel 7, and Channel 56—many are still there, but they're just not covering our stories as much.

Generally if you get something in the print media, it rebounds in the other media. For example, I got a call from a *Wall Street Journal* reporter wanting me to comment on a quote from an official at a local health maintenance organization (HMO) about their limited coverage of Viagra. The official said to the reporter, "The fundamental question is how many erections does an HMO owe a patient?" In responding, I turned the question around. I said the fundamental question should be What is in the interest of the patient? and that should be determined between the physician and a patient. The fact that an HMO was posing such a question is why people become so angry at HMOs. The next day I told our staff, "Tomorrow is going to be our biggest media day of the year." The next thing I knew, we were on two TV stations and national radio because of that story. That's an example of how media can drive a story.

Copyright 1999. All rights reserved by Third Sector New England, Boston, MA (Volume 6, Issue 1). The *Nonprofit Quarterly* features innovative thinking and management practices in the nonprofit sector. For reprint permission or subscription information please go to www.nonprofitquarterly.org/subscriptions.