

## Communicating *for Change*

# 2

# Planning Ahead for Strategic Media Advocacy



*Communicating for Change / Planning Ahead for Strategic Media Advocacy*  
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**Communicating** *for Change*

2

Planning Ahead for  
Strategic Media Advocacy



Center for Healthy Communities

## Foreword

The California Endowment recognizes that no single policy or systems change will achieve our goals. Rather, we believe that many policy, system and organizational changes are necessary at the local, state and national levels to achieve these goals. We also believe that everyone has a role to play and that all organizations can contribute to a change process.

In order to help build the capacity of our partners to elevate our collective goals and put forth solutions, The Endowment's Communications and Public Affairs Department and the Center for Healthy Communities have developed *Communicating for Change* as part of the Center's Health ExChange Academy. The *Communicating for Change* series is designed to provide advocates with the resources they need to effectively use media advocacy and other strategic communications tools to ensure that their policy goals for improving the health of California's underserved communities remain in the spotlight.

Special thanks are due to the team at Berkeley Media Studies Group and all the other partners who participated in the design of this curriculum, which we hope will help you amplify your voices for change.

Sincerely,

A handwritten signature in black ink, appearing to read 'Robert K. Ross', with a stylized, flowing script.

Robert K. Ross, M.D.  
*President and Chief Executive Officer*  
*The California Endowment*

# Curriculum Introduction

The Health ExChange Academy's *Communicating for Change* training series will help advocates learn to engage the news media strategically. Whether the goal is increasing state funding for physical education programs or requiring hospitals to provide language access services, advocates can harness the power of the news media to amplify their voices, reach policy-makers and advance their policy goals. This seven-session training series, which combines advocacy case studies with hands-on activities, will help advocates develop their media strategies and the skills needed to engage the news media effectively. The goal is to learn how media advocacy strategies can best support policy-change efforts to create healthier communities.

By sharing strategic and tactical decisions of veteran advocates throughout California, the trainings will prepare participants to develop their own media advocacy plans. Course participants, for example, will learn to:

- **develop a media strategy that supports their advocacy goals**
- **frame the issue to include a role for institutional as well as individual responsibility in solving community health problems**
- **write concise messages that get reporters' attention**
- **speak confidently and succinctly with the news media**
- **become a resource for reporters by providing trusted research, interesting news stories and articulate spokespeople**
- **create news on their issue at strategically important moments**
- **use the latest communications tools, such as blogs, viral marketing and e-flicks, to engage allies during the policy-change campaign**

After the trainings, the user-friendly manuals can be shared with other leaders in participants' organization or advocacy coalition. The manuals include take-home tools, such as strategic planning worksheets and group exercises, to help advocates put these concepts into practice in their own campaigns.

This manual is for participants of the second training session of the *Communicating for Change* curriculum, Module 2: *Planning Ahead for Strategic Media Advocacy*. The topics for the other six training sessions are listed in the Curriculum Overview on the next page. We hope you enjoy this training and that it helps you reach your goals of creating healthier communities across California.

## CURRICULUM OVERVIEW

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### **Module 1: *Making the Case for Health with Media Advocacy***

Module 1 introduces how to use media advocacy strategically to advance policy. Participants will learn to recognize the news media's role in shaping debates on community health. They will clarify their overall strategy and learn how it relates to a media strategy, a message strategy and a media access strategy. This will be the basis for subsequent trainings.

### **Module 2: *Planning Ahead for Strategic Media Advocacy***

Module 2 takes participants through each step of developing a media advocacy plan: setting goals and objectives, identifying strategies and tactics, assessing resources, determining time-lines, and specifying who will do what. Participants will learn to integrate communications planning organizationally and develop timely, proactive news coverage.

### **Module 3: *Shaping Public Debate with Framing and Messages***

Module 3 explains framing—what it is and why it matters—and helps participants apply that knowledge to developing messages in advocacy campaigns. Participants will practice framing a range of community health issues to support policy change.

### **Module 4: *Creating News that Reaches Decision Makers***

Module 4 explores different news story elements so participants can get access to journalists by emphasizing what is newsworthy about their issue. Participants will explore how to create news, piggyback on breaking news, meet with editorial boards, submit op-eds and letters to the editor, and develop advocacy ads.

### **Module 5: *Engaging Reporters to Advance Health Policy***

Module 5 gives participants intensive practice being spokespeople for their issue, including on-camera training. Participants will learn to anticipate and practice answering the tough questions reporters ask.

### **Module 6: *Targeting Audiences with New Communication Tools***

Module 6 gives participants a tour of the latest communications tools, including blogs, e-flicks and viral marketing, so they can tailor their advocacy communications to specific goals and audiences.

### **Module 7: *Training Allies in Strategic Media Advocacy***

In Module 7 those who want to train others in their organization learn interactive techniques for teaching media advocacy.

# Table of Contents

<b>1. STRATEGIC COMMUNICATIONS PLANNING: AN INTRODUCTION</b>	<b>1</b>
<b>2. SEVEN TIPS TO GET YOU STARTED CREATING A STRATEGIC MEDIA ADVOCACY PLAN</b>	<b>2</b>
<b>3. TIP 1: TAKE STOCK OF WHERE YOU ARE</b>	<b>4</b>
<b>4. TIP 2: LET OVERALL STRATEGY SET THE COURSE</b>	<b>6</b>
<b>5. TIP 3: BRING ALONG THE RIGHT PEOPLE</b>	<b>13</b>
<b>6. TIP 4: MAP YOUR WAY</b>	<b>18</b>
<b>7. TIP 5: INVEST IN THE TRIP</b>	<b>29</b>
Staff and Allies	29
Research	30
Materials	32
Relationships with Reporters	34
<b>8. TIP 6: TAKE ADVANTAGE OF OPPORTUNITIES</b>	<b>36</b>
<b>9. TIP 7: DON'T BE AFRAID TO CHANGE DIRECTION</b>	<b>37</b>
<b>10. CONCLUSION</b>	<b>42</b>
<b>11. RESOURCES</b>	<b>44</b>
<b>12. WORKSHEETS</b>	<b>50</b>



# Strategic Communications Planning: an Introduction

# 1

Imagine you learned today that policymakers will debate your policy proposal next week. What would you need in place to take advantage of that opportunity?

- Are **spokespeople** ready to make your case to policymakers and the news media?
- Have **press kits and advocacy materials** been created to explain your perspective and policy goal?
- Have you established **relationships with reporters** who can highlight your issue at crucial moments?
- Is your **organization** prepared to make strategic decisions quickly?

Your wish list may be longer, but if you don't have a lot of time it won't do you much good. Planning your media advocacy efforts *before* such opportunities arise can help you anticipate what you will need to make your case effectively when opportunities appear.

This module presents seven tips to guide your media advocacy planning. Whether you write a comprehensive plan or simply hold a series of discussions to develop your strategies and work plans, this manual will help you think far enough ahead to take advantage of the media advocacy opportunities that can advance your goals.

*“In the space of two days I had evolved two plans, wholly distinct, both of which were equally feasible. The point I am trying to bring out is that one does not plan and then try to make circumstances fit those plans. One tries to make plans fit the circumstances.”*

—General George S. Patton, Jr.

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## MODULE 2 LEARNING OBJECTIVES

**In this training participants will:**

- **explore how to engage the media strategically to advance advocacy goals**
- **assess their organization's communications capacity and strategies**
- **learn how communications planning can increase organizational effectiveness**
- **create a media advocacy plan and supporting materials**
- **develop relationships with other California advocates**

# 2

## Seven Tips to Get You Started Creating a Strategic Media Advocacy Plan



### TIP 1: Take Stock of Where You Are

Your media advocacy plan should build on your assets and account for your challenges. What expertise, publications or relationships do you have? Where will you need to invest resources? You can find realistic and creative ways to support your advocacy efforts by planning your media work strategically.

### TIP 2: Let Overall Strategy Set the Course

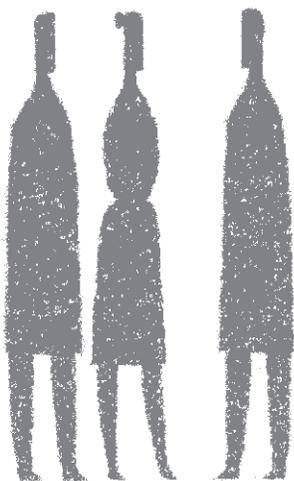
Make sure your media advocacy plans advance your overall advocacy goals. Who has the power to make the change you want? Is media the best way to communicate with that target? Decide that first, before worrying about how to get media attention.

### TIP 3: Bring Along the Right People

Who decides your advocacy, fund-raising and communications goals? Who carries out those plans? Involve key staff and allies in strategic discussions so you can make quick decisions as the policy debate on your issue changes course.

### TIP 4: Map Your Way

Your media advocacy plan is a general road map that sends you in the right direction. Look ahead to see when spotlighting your issue may advance your advocacy goals. Plan for what you will need to make the case effectively. Whether you chart a few goals or create a detailed plan, the process should move you from strategic idea to clear action.





# 3

## TIP 1: Take Stock of Where You Are

*Your media advocacy plan should build on your assets and account for your challenges.*



A good chef looks into the cupboard and makes a list of what he or she has on hand and needs before cooking a meal. Worksheet 1, the ACTION Assessment, in the back of this manual can help you look into your organizational “cupboard” to prepare for creating a media advocacy plan. You will take stock of your existing strengths, internal challenges, external threats, information needs and potential next steps. Knowing your organizational and political situation will help you build appropriate and effective media advocacy strategies.

You may have already taken stock in this way as part of creating an organizational strategic plan or a campaign-specific advocacy plan. In that case, terrific! Now focus on the assets and challenges that relate to media goals.

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### YOUR ASSETS MAY INCLUDE:

- a range of allies who can speak to the importance of your policy goal
- strong relationships with reporters at important news outlets
- the ability to quickly mobilize community members for public action

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### YOUR CHALLENGES MAY INCLUDE:

- a well-organized opposition with compelling arguments
- a limited budget for research, staff training or advocacy materials
- a crowded news environment that is difficult to break into



# 4

## TIP 2: Let Overall Strategy Set the Course

*Make sure your media advocacy plans advance your overall advocacy goals.*



As presented in Module 1, media advocacy planning involves a series of group discussions and decisions that we suggest making in four stages: the layers of strategy.

### MEDIA ADVOCACY LAYERS OF STRATEGY

#### OVERALL STRATEGY



- Define the problem you want to address.
- Clarify the policy solution for which you will advocate.
- Identify the target with the power to make that change.
- Name the allies who can help make your case.
- List the advocacy actions you will take to influence the target.

#### MEDIA STRATEGY



- Identify the best methods to communicate with your target.
- Decide whether or not engaging the media will advance your overall strategy.
- Find the media outlets that will best reach your target audiences.
- Compile the media tactics you will employ.

#### MESSAGE STRATEGY



- Frame the issue to reflect your values and support the policy goal.
- Create a message that describes the problem, the solution and why it matters.
- Develop a plan to assess and improve the effectiveness of your message.
- Decide who will convey your message.
- Identify the materials you will need to make your case.

#### MEDIA ACCESS STRATEGY



- Determine when media attention could affect the policy process.
- Figure out how you will gain access to the media.
- Prepare newsworthy story elements to offer reporters.
- Establish a plan for capturing and reusing coverage.

Worksheet 2 at the back of this manual will help your group discuss key questions for developing each layer of strategy. For more in-depth help developing an overall and media strategy, see Module 1. Modules 3 and 4 focus on message strategy and media access strategy, respectively. Our goal here is to show how planning can help advocates refine and carry out these strategy decisions.

At the start of any advocacy campaign you decide your overall strategy — the policy change you want to see and how you will get there. Then you are ready to consider your media, message and media access strategies. As the Q&A below illustrates, keeping your eye on the prize will help you evaluate your options strategically.

**Question:** Is pursuing media attention a smart choice?

**Answer:** That depends on whether your target is responsive to direct communications tactics such as in-person meetings or letters. If not, it may be time for the public attention news coverage can bring.

**Question:** Do we want coverage in a business journal or in the *Sacramento Bee*?

**Answer:** That depends on who has the power to make your desired policy change. Is it a local business executive or a Sacramento legislator? You may use different media outlets to reach your primary target — the person with the power to make the change — versus your secondary target, those you need to mobilize to put pressure on your target.

**Question:** Should the tone of our paid ad be confrontational?

**Answer:** That depends on what type of relationship you are trying to foster with your target. Have polite, private conversations stalled? What risk makes sense for the short- and long-term effectiveness of your effort?

**Question:** When might news attention best serve our advocacy goals?

**Answer:** That depends on whether your target is a school board that meets monthly or a city zoning commission that makes decisions once a year.

While you may sketch out all four layers of strategy at the outset of your campaign, expect to revise them along the way. As the case study of the campaign to get San Francisco MUNI to replace dirty diesel buses shows, if your overall strategy changes during the campaign, so must your media, message and media access strategies (see sidebar). A truly strategic media advocacy plan is never fixed, but evolves as your advocacy campaign evolves.



## Changing Targets, Changing Tactics

The Dump Diesel Coalition, which included Our Children's Earth, National Resources Defense Council, American Lung Association, Bayview Hunters Point Community Advocates and Sierra Club, came together with an ambitious goal: to phase out diesel buses in San Francisco, California. Increased levels of diesel fumes have been linked to lung disease — especially asthma in children, lung cancer and pneumonia — heart disease and premature death. For more than two years, MUNI, the agency in charge of the San Francisco bus fleet, had ignored repeated direct requests from advocates to start replacing diesel buses with cleaner alternatives. During this period, advocates saw the power of collective action when, after they held a press conference in the Bayview Hunters Point neighborhood, MUNI agreed to improve the buses on those routes. Such concessions were rare, so the advocates decided to organize a formal coalition and hire a campaign organizer to increase public pressure on MUNI.

In 2001, the Dump Diesel Coalition launched their public campaign to get MUNI to replace the diesel buses with cleaner alternatives. Over the course of the three-year campaign, the coalition's goal remained constant, but its advocacy strategies changed course three times to target different decision makers. With each new target came a more refined media strategy with distinct media tactics.

### Target 1: The Board of Supervisors

Right away, the coalition saw a political opportunity to advance its goals. MUNI needed budget permission from the San Francisco Board of Supervisors to buy new diesel buses. The coalition met with members of the Board of Supervisors and convinced them to take the health and environmental impact of diesel fumes seriously. The board did approve MUNI's purchase of new diesel buses, but with a caveat. MUNI would be required to study what it would take to purchase alternative fuel vehicles

in the future. At that point, MUNI had missed two deadlines to apply for local air district funds to purchase cleaner fueled buses and had delayed instituting a pilot program to test natural gas buses for four years. Eventually MUNI complied with the research mandate, but its report discredited all alternative fuel options. MUNI argued that San Francisco's steep hills would prevent the popular option of natural gas from being feasible, despite it being used in other cities. Under pressure, MUNI did agree to a timeline for replacing older diesel buses.

The coalition was skeptical that MUNI would ever implement this bus replacement plan. The report on the feasibility of alternative fuel options had taught advocates a powerful lesson. As an independent agency MUNI could control the debate on what was necessary and feasible by limiting the data it released on its fleet operations.

The coalition decided to improve the power balance by correcting the information imbalance. In an earlier debate, MUNI downplayed the environmental and health damage done by diesel exhaust by arguing that most of the bus fleet in operation was the cleaner burning diesel buses purchased since 1997. MUNI claimed that the oldest, dirtiest diesel buses were only used in emergencies.

The Dump Diesel Coalition decided to do its own study. For one week in March 2003 advocates tracked buses leaving two main MUNI lots for their morning runs. They logged ID numbers of each bus leaving the lot and used public information requests and purchase logs to determine the type and age of buses. By tracking every bus for the same time period and observing multiple locations on multiple days, the coalition created a study that was credible, defensible and fair. The results of this survey showed that one out of every three buses being used were beyond their "useful life" of 14 years. The study also found that, instead of being used only as an emergency fleet as MUNI had publicly claimed, the oldest and dirtiest diesel buses were in fact in regular, daily use. The coalition had collected the data it needed to make its case.

Since efforts to work directly with MUNI and the Board of Supervisors had not led to significant changes, the coalition developed a media strategy to create pressure on both agencies. Its first media tactic was to create news on this issue by holding a press conference outside MUNI headquarters. The location provided a good visual and the coalition also gave reporters a range of authentic voices to interview. Speakers included members of the Board of Supervisors, health and environmental experts, and advocates from Bayview Hunters Point, a neighborhood that housed one of MUNI's largest bus lots and suffered more than most from idling diesel buses. The coalition gave the *San Francisco Chronicle* an exclusive early release of the report. This resulted in a news story that captured the coalition's perspective. This exclusive arrangement also began a relationship with a reporter who continued to follow the story as it progressed. The event was successful in generating news coverage critical of MUNI's actions and raising the profile of the harm of MUNI's diesel buses.

Unfortunately, the coalition still did not have the political power it needed. Despite growing support from the San Francisco Board of Supervisors, the Dump Diesel Coalition was discouraged. After two years, MUNI had not taken substantial actions to improve its fleet. Ultimately, MUNI is an independent agency and the Board of Supervisors has limited oversight. The coalition decided it was time to change its strategy and target MUNI decision makers directly.

## Target 2: MUNI Management

Since MUNI had been unresponsive in previous attempts to work with the coalition directly, the coalition developed an advocacy strategy centered on increasing public pressure on the agency. The new overall strategy of getting direct action from MUNI meant rethinking the media strategy and developing new tactics.

In the summer of 2003, the Dump Diesel Coalition purchased ad space in San Francisco bus shelters with the goal of increasing public pressure on MUNI. The hard-hitting ad took the form of a “Wanted” poster, showing the pollutants spewing from MUNI buses. The coalition chose to place the ads in three strategic locations that would be seen by a large number of MUNI riders, political decision makers, and MUNI officials (e.g., outside MUNI headquarters and city hall, and in the financial district). The overall strategy was to pressure MUNI directly by asking riders to call the executive director of MUNI (the ad featured his private office line). The coalition supported this community organizing tactic with communications materials such as the “Toxic Pass,” which was cleverly designed to mimic a MUNI monthly “Fast Pass” and was handed out at bus shelters. The “Toxic Pass” described the dangerous health effects of MUNI’s diesel bus fleet in language relevant to people who ride the buses regularly.

The tone of this media strategy was intentionally confrontational. The coalition wanted quick, tangible action from MUNI officials to move the issue forward. MUNI responded by quietly pressuring Viacom, the company in charge of bus shelter advertising, to reject the ads. A clause in MUNI’s contract with Viacom gave it this option. The advocates had done their homework and knew that Viacom had accepted ads from political and nonprofit causes in the past. The coalition had a lawyer write a letter to MUNI and Viacom hinting at legal action for its possibly discriminatory actions.

Then, the coalition gave the story to two top political columnists at the *San Francisco Chronicle*, who ran the item as the top story in their column along with a reproduction of the “Wanted Dirty Diesel Bus” ad. Within 48 hours of the news report, the head of MUNI signed off on Viacom accepting the ad. The media strategy of purchasing advertising had a powerful earned media benefit: a news story about the controversy over the ad. But the controversy over the ad wasn’t the only thing discussed in the story. The coalition also got the opportunity to explain why they purchased the ads and to repeat its policy goal of eliminating diesel buses.

As a result of the ad and continued community organizing, the coalition gained more support from its city hall allies, discouraged MUNI from asking for more money for diesel buses, and made *diesel* a dirty political word. For its part, the Board of Supervisors stepped up its effort to resolve this problem by bringing in the Transportation Authority to act as an independent negotiator between MUNI and the Dump Diesel Coalition.

## Target 3: San Francisco Voters

Two years after the coalition’s initial request for MUNI to phase out diesel buses, MUNI had yet to take significant action to clean up its fleet. So the coalition once again changed its strategy. This time, the target was the people of San Francisco. The Dump Diesel Coalition placed Proposition I on the March 2004 ballot. The initiative required MUNI to comply with an official plan for phasing out

the dirtiest diesel buses, approximately 100 buses purchased before 1991, within three years (by 2007). The initiative allowed MUNI to apply for a one-year extension if necessary. MUNI would fund the bus replacement through available federal and county transit funds.

To place a proposition on the ballot, signatures from 5 percent of the mayoral vote or four Board of Supervisor members are required. Gathering 10,000 plus signatures from registered San Francisco voters is time-consuming and expensive. Fortunately, past organizing with the Board of Supervisors paid off when Supervisors Ammiano, Maxwell, Sandoval and Gonzalez signed the petition sponsored by Supervisor Daly.

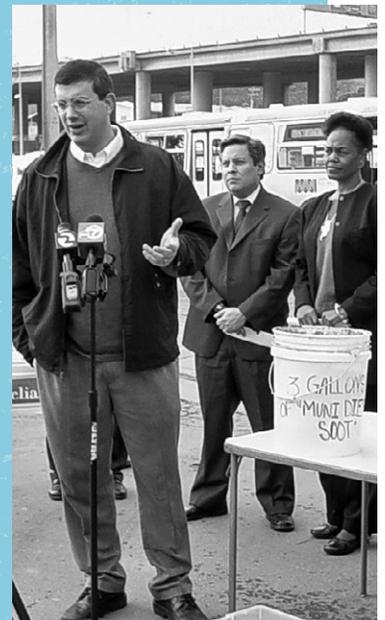
This new advocacy strategy required a new communications strategy. The first step was for the coalition to change its name from Dump Diesel Coalition to Coalition for Clean and Reliable MUNI. The coalition felt the more positive title would appeal to voters. Also, the coalition wanted to emphasize that newer buses would help improve the on-time reliability of MUNI—a chief concern in transit-focused San Francisco. In 2004, the coalition held a kickoff press conference with three supervisors and a host of advocates gathered outside the largest MUNI bus depot in the city. Creating a powerful visual, the supervisors poured a gallon of coal soot into a bucket—representing the toxic pollution one diesel bus expels every single day. This action caught the attention of reporters and the crushed coal/diesel soot image was shown repeatedly on TV newscasts on the midday, afternoon and evening news.

This media tactic was just one tool in the campaign to gain public support for Proposition I. The campaign also included direct communication with voters through phone banking, leafleting, postcards, pamphlets, street signs, mailers, TV debates and speaking at dozens of public events.

As the election neared and the proposition was gaining steam, MUNI tried to take the wind out of the advocacy sails by suddenly releasing its own plan to have an entirely zero emissions bus fleet in operation by the year 2020. But it was too late to convince the voters that MUNI was doing enough. In March of 2004, Prop I won by a landslide with 67 percent of the vote.

The following year when MUNI missed the deadline for action and failed to ask for an extension, it did not go unnoticed. The *San Francisco Chronicle* and other papers ran articles about the deadline passing and advocates met with MUNI about improving compliance. In a series of negotiations, MUNI got permission from government regulators to buy hybrid electric-diesel buses. The coalition accepted these buses because they are cleaner than the current fleet. Although the timeline was delayed concrete action was being taken in the right direction to get the dirty diesel buses off the streets and replace them with cleaner, alternatively fueled vehicles.

On June 1, 2006, the mayor of San Francisco and MUNI held a news conference rolling out the first hybrid MUNI bus. The coalition's tone at this press conference was more supportive than it had been in previous stages. As a strategic move, advocates let MUNI take credit for doing the right thing and didn't focus on the fact that three years of political pressure were required to force it to finally act.



## THE LESSONS

**Include key partners.** The organizations involved in the Dump Diesel Coalition came together because they knew that collective action would enable them to exert continual pressure on MUNI. Each organization brought unique strengths and constituencies. The American Lung Association, a 100-year-old public health organization, for example, provided a credible source for reporters and policymakers on the health impact of diesel fumes. Bayview Hunters Point community advocates testified at numerous public hearings and news conferences on how diesel fumes impacted the health of neighborhood residents. When they testified, public officials were confronted with the real-life stories of constituents suffering from the effects of bad public policy. This testimony by people whose health was at stake contributed greatly to the success of this coalition.

**Prepare to make your case.** The coalition learned early that to be able to make its case well it needed independent data. MUNI's statements often minimized the health and environmental effects of diesel buses and discredited alternative options. But the coalition was able to fire back after it collected its own data and revealed a much more serious problem than MUNI's research had suggested.

**Changing targets requires changing tactics.** Over the course of the three-year campaign, the overall goal of getting MUNI to phase out diesel buses remained constant. But as the coalition targeted different decision makers, it developed new advocacy strategies with refined media strategies and distinct media tactics.

When the Board of Supervisors was the target, the coalition's media strategy involved writing and releasing a report and testifying at hearings. The most successful media tactic was holding a news conference outside MUNI headquarters. Later, when MUNI was the target, the media strategy involved community organizing to apply direct pressure. Paid advertisements in highly public places got the attention of a variety of targets, from MUNI and political officials to San Francisco bus riders. Finally, when San Francisco voters were the target, the coalition extended its community organizing efforts through voter materials and increased news attention. The coalition sought news attention both from large news outlets such as the *San Francisco Chronicle* and local sources such as the Bayview Hunters Point neighborhood newsletter, which could help organize the affected community. Each stage involved rethinking the advocacy strategy, media strategy and media tactics.

**Provide reporters what they need to tell the story.** With each new media strategy, the coalition used a variety of newsworthy elements to provide reporters with what they needed to tell a good story. Throughout the campaign, the coalition created news with drama, such as juxtaposing MUNI's claims with independently collected data. The coalition understood the value of using interesting visuals. The bus shelter ads used a "Wanted" poster format to highlight the dangers of diesel fumes. Supervisors pouring soot at a press conference illustrated how much exhaust a MUNI bus releases in one day. Authentic voices were provided by people affected by the diesel exhaust, policymakers and researchers. Each different voice made the story come alive and showed the diversity of support for diesel bus retirement.

# TIP 3: Bring Along the Right People

# 5



*Involve key staff and allies in strategic discussions so you can make quick decisions as the policy debate on your issue changes course.*

Whether you are creating a media advocacy plan for a large organization or a single-issue campaign, bringing together key individuals who understand the importance of — and have the authority to make — strategy decisions is essential.

- **Who decides your advocacy, fund-raising and communications goals?**
- **Who carries out those plans?**
- **Should anyone outside your organization be involved?**

Involving key staff and allies in discussions early on can help you make sound strategy decisions later as the policy debate changes course. As the case study of the California Immigrant Policy Center illustrates (see sidebar on page 15), building the capacity of key staff and allies to create and act on strategic media plans can be well worth the investment. Use the following table as a guide in creating an effective communications committee in your organization.

## CREATING A COMMUNICATIONS COMMITTEE

A communications committee can streamline decision making and help clarify how each communications strategy, tactic and publication can be designed to advance your advocacy efforts. Five key roles for creating an effective communications committee include:

- **1. Facilitate joint planning between different departments or organizations.** If your advocacy campaign has communications responsibilities spread over multiple staff or organizations, this role is especially important. The committee can coordinate when such communications tactics as organizing rallies, releasing publications and creating press events might advance the advocacy goals.

- **2. Develop publications and press materials.** A communications committee can clarify what materials will be needed to make the advocacy case effectively with each target audience. If you discuss the advocacy strategy and tone you will take with your target, you'll have a much easier time creating media materials.
- **3. Track media coverage and develop relationships with reporters.** The committee can alert colleagues of opportunities to create news and piggyback on breaking news. By monitoring coverage and reaching out to reporters regularly, the committee can increase the chances that the organization develops solid relationships with reporters, becomes a trusted source, and attracts news attention at strategic moments.
- **4. Build organizational capacity to respond to press calls.** By creating a record of staff issue expertise and media experience, the committee can make sure the organization puts forth its best spokespeople. It can also arrange communications training opportunities.
- **5. Create a communications protocol.** The committee can clarify how strategy decisions will be made and what is expected of each staff person. This can be important in fast-moving advocacy campaigns where communications strategies or materials have to be updated quickly or when reporters call for reactions to late breaking developments. A clear communications protocol can also help if you have to respond to a crisis or an unexpected event that catapults your topic into public discussion.



## Strength from Strategic Communications Planning

California Immigrant Policy Center (CIPC) is a statewide partnership of four immigrant organizations: the Asian Pacific American Legal Center of Southern California; Coalition for Humane Immigrant Rights of Los Angeles; National Immigration Law Center; and Services, Immigrant Rights and Education Network. CIPC works to establish local and state policies that improve the lives of low-income immigrants and their families, especially with regard to health care and access to social services. CIPC also provides technical assistance, training and education on immigrant issues.

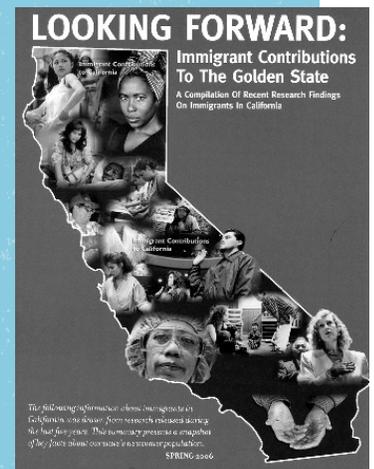
In 2004 CIPC (then known as the California Immigrant Welfare Collaborative) began to develop and implement a strategic media and communications plan. Since its founding in 1996, CIPC had accumulated a wealth of experience advancing pro-immigrant policies in a variety of settings, from the state legislature to local city councils, but it had never proactively used the media to help shape the public debate around immigrants and immigration issues.

Two events in which negative portrayals of immigrants in the news directly hampered CIPC's policy agenda and convinced the collaborative to invest in creating a strategic communications plan and in building its communications capacity. These events were the terrorist attacks of September 11, 2001, and the increasingly acrimonious debate over a law that would allow undocumented immigrants to obtain driver's licenses.

In the post-9/11 environment, anti-immigrant sentiments were so pervasive in political discussions and the news media that immigrant rights groups had to focus their efforts on countering negative stereotypes and defending basic civil liberties. The public debate characterized many immigrants as threats and left very little room for discussion about proactive policy changes to improve the lives of immigrants.

In 2003, CIPC and other groups working on immigrant issues again faced a surge of anti-immigrant sentiments and portrayals in the news as a result of an effort to pass legislation to secure driver's licenses for undocumented immigrants. A bill allowing undocumented immigrants to obtain driver's licenses passed and was signed into law by then Governor Gray Davis, only to be overturned later when Governor Arnold Schwarzenegger took office.

Fresh from these two extremely complex political scenarios, CIPC decided to think beyond the daily policy battles and create a proactive strategic communications plan. CIPC's goal was to shift the public conversation so that it emphasized the positive contributions of immigrants in California. From that platform, CIPC believed it could argue more effectively for many policies that protect immigrants' rights and participation in civic life. The overarching communications plan and related strategic messages could then be used to support many future policy goals.



## Invest in Strategic Communications

### Build on Existing Assets

In 2004, CIPC began its strategic communications efforts by building on its assets, most notably staff talent. Each partner organization had staff members with both policy and communications experience who came together to form a media committee. This committee meets weekly to discuss how CIPC's media work can best support its policy agenda. CIPC also invested in creating the position of Communications Director. CIPC realized that communications work is most effective when it is integrated throughout an organization, so they invested in training the entire staff in media skills and involved everyone in developing the strategic communications plan.

### Develop a Day-to-Day Protocol

One communications challenge for coalitions is that any partner organization can be contacted independently by reporters for comments on breaking news. The CIPC media committee developed a clear protocol to handle all incoming interview requests received by CIPC. When staff members receive interview requests, they contact the communications director who decides how to proceed. She decides if the interview topic relates to one of CIPC's priority areas and, if so, who at what organization has related expertise. She then works with that staff person to prepare for the interview. If the interview topic is not within CIPC's collective policy agenda, the reporter is generally referred to another organization or to media staff within one of the partner groups. This investment in staff training, strategic planning and support for interviews has allowed CIPC staff to engage the news media more confidently and to take advantage of each person's area of expertise.

### Create Frames and Messages

A major component of CIPC's strategic communications planning was to develop issue frames and messages that could support its future policy goals. The pervasive negative frames it was up against portrayed immigrants as a danger to our society or a drain on public resources. Through the media committee, CIPC began proactively discussing messaging as it related to CIPC's policy work and, specifically, the media work to advance certain policy goals.

Given the breadth of its policy goals, the complexity of anti-immigrant sentiments and the wildfire nature of immigration politics in 2005, CIPC knew it could not create a single frame or message that would work in all instances.

The goal was to develop a broad values-based frame that would guide all communications decisions. CIPC decided to build its communications on a frame emphasizing the positive contributions immigrants make to our society, such as paying taxes, contributing to Social Security, enriching civic life with cultural diversity, and making up a large portion of the California labor force. CIPC decided to stop producing materials that countered opposition "myths" with these "facts" since simply acknowledging the myths, CIPC believed, might unintentionally reinforce them. Instead, it created new publications and pitched news stories focusing on the positive contributions of immigrants in California. CIPC published a document in 2005, and then updated it in 2006, called *Looking Forward: Immigrant Contributions to the Golden State*. Throughout 2005 and 2006 CIPC used

its new media tools and knowledge with each policy initiative. CIPC found that when the conversation starts with immigrants as fully integrated, valuable members of our society, it becomes easier to defend policies that give immigrants equal rights and full access to services.

Beginning in the spring of 2005, CIPC began working with a Los Angeles–based firm, Cause Communications, on a long-term strategic communications plan. The plan included a number of components, including ideas for repositioning the organization, development of a series of issue-based materials for journalists, and the creation of a rapid-response capability in order to respond to stories in the press about immigrants. This work is currently underway and in various stages of implementation. One clear outcome has been the organizational name change from the California Immigrant Welfare Collaborative to the California Immigrant Policy Center, which better represents the range of policy issues CIPC addresses.

### **Ensure Rapid-Response Capabilities**

One goal in CIPC’s strategic communication plan is to be able to react quickly when a negative policy is enacted or an event occurs that results in harm to immigrants and/or their families. An example might be passage of a local ordinance requiring landlords to deny access to rentals based on a person’s immigration status.

A central component of this rapid-response plan is the creation of mechanisms for prioritizing media efforts. Staff needs to be trained to respond with little notice if necessary. Spokespeople need quick access to talking points. The strategic planning process of developing this new framing approach and accompanying materials has strengthened CIPC’s ability to quickly develop, assess and rework responses to emerging policy struggles. When, for example, a discriminatory housing ordinance was passed by a city council, CIPC was able to respond overnight. Drawing from prior research, staff could quickly dismantle the opposition’s arguments and decide how to reframe them.

### **Enjoy the Fruits of Your Labor**

CIPC is starting to see real improvements in its media coverage. There has been an increase in press reports about CIPC’s legislative work. Internally, CIPC staff has felt better prepared to take on more difficult challenges. For example, recently, CIPC’s director received an invitation to appear live on a popular radio program in Los Angeles opposite a prominent conservative senator who is the spokesperson for an anti-immigrant initiative. The invitation was extended just an hour before the show was to air. A year ago, CIPC might not have accepted such an invitation on short notice, but now the collaborative felt prepared. CIPC’s media team saw a great opportunity and moved quickly to help prepare for the interview. CIPC’s director made the case well in the face of opposition. The advance preparation, which included developing messages and building media skills, allowed CIPC to take advantage of a great opportunity to discuss its position and to do so effectively.

# 6

## TIP 4: Map Your Way

*Whether you chart a few goals or create a detailed plan, the process should move you from strategic idea to clear action.*



Your media advocacy plan is a general road map that sends you in the right direction. Create it at the start of your advocacy campaign and revise it along the way. The goal is to support your overall strategy by creating the policy change you want to see. Your plan can include many smaller objectives and tasks to help you achieve that goal. Your plan should account for:

- **your current situation, including strengths and challenges** (See TIP 1)
- **how you will act on the four layers of strategy** (See TIP 2)
- **how you will build the organizational capacity to carry out the plan** (See TIPS 3 & 5)

You can record your media advocacy plans with various levels of detail. You may create a plan complete with objectives and implementation tasks, as illustrated in the media advocacy template (right). This plan has roughly one objective focused on each layer of strategy, as well as objectives for building capacity and assessing the plan. Consider this a menu of options. Use what is relevant to your current campaign.

## A STRATEGIC MEDIA ADVOCACY TEMPLATE

### OBJECTIVE 1: BUILD ORGANIZATIONAL CAPACITY TO DEVELOP AND IMPLEMENT EFFECTIVE MEDIA STRATEGIES.

#### TASK

- A Create a media committee to integrate communications planning across the organization or coalition.
- B Draft a plan to build the media advocacy skills of staff and partners.
  - Recruit and train staff and allies to be spokespeople.
- C Develop and implement organizational communications protocols to clarify who makes strategy decisions and talks with reporters.
- D Establish a rapid-response team to act quickly on unexpected political developments or news opportunities.

### OBJECTIVE 2: CLARIFY OVERALL STRATEGY AND MEDIA STRATEGY.

- A Confirm policy goals and strategy.
- B Specify target audiences.
- C Identify and evaluate communications opportunities for each target.
- D If media options are selected, decide the most appropriate media outlets to reach each target.

### OBJECTIVE 3: CULTIVATE AND MAINTAIN RELATIONSHIPS WITH SELECTED JOURNALISTS.

- A Monitor selected news sources (based on Task 2D).
- B Harvest the bylines for a media contact database.
- C Cultivate relationships with select reporters (see TIP 5).

### OBJECTIVE 4: DEVELOP CONSISTENT AND EFFECTIVE MESSAGES TO SUPPORT YOUR POLICY GOALS.

- A Conduct or collect research to determine how to frame the issue.
  - Examine news coverage.
  - Examine public opinion research.
  - Test different frames with different audiences.
- B Develop a core message describing the problem, the policy solution and why it matters.
- C Adapt the message for different targets and messengers.

#### OBJECTIVE 4: DEVELOP CONSISTENT AND EFFECTIVE MESSAGES TO SUPPORT YOUR POLICY GOALS. (CONT.)

##### TASK

- D Adapt existing materials to reflect the new message.
- E Identify what materials you will need to develop for the campaign (see TIP 5).

#### OBJECTIVE 5: INCREASE VISIBILITY, LEGITIMACY AND CREDIBILITY OF YOUR POLICY OBJECTIVE.

- A Create a timeline of key moments for media action.
- B Develop story elements such as visuals, social math and media bites.
- C Develop templates for press kits including briefing sheets, responses to frequently asked questions and a collection of recent news clips.
- D Identify and train authentic voices to serve as spokespeople.
- E Write materials for advocates (talking points, etc.).
- F Generate news coverage.
  - Prepare press materials (fill in the templates in Task 5C).
  - Hire media relations help (if necessary).
  - Pitch the story.
  - Hold the newsworthy event.
  - Follow up any news coverage with letters to the editor.
- G Place advertising if that media strategy is selected.
- H Reuse the news with allies, policymakers and additional reporters.
- I Develop editorial page strategies.

#### OBJECTIVE 6: ASSESS AND REFINE NEWS COVERAGE AND MEDIA PLAN.

- A Keep clippings of coverage and discuss with staff and allies.
- B Decide what you want to evaluate (process and/or outcome).
- C Reassess your media advocacy plan in light of your evaluation.

You may also discuss your plans thoroughly but record just a few decisions directly onto worksheets so you are one step closer to implementation. On the following pages are three sample worksheets. Each one is filled in with ideas to support a hypothetical campaign to enact legislation that would increase funding for school-based health centers in California. The overall strategy in this example is to pass a legislative bill by using a combination of direct communication tactics, such as legislative visits, and a media strategy that creates news in Sacramento media outlets and the home districts of key legislators. The worksheets capture key planning information such as:

- **the advocacy goal**
- **a range of communications options advocates might use with the target**
- **the news outlets to approach**
- **a timeline for the campaign**
- **a few examples of what to develop to make the case effectively in the news**

However you track your decisions, your planning process should move you from strategic ideas to clear action. By adding who will do what, by when and with which resources, you can build on the strategic media advocacy plan to create a clear work plan to implement your decisions. (You can use Worksheets 3–6 at the back of this manual to guide your work.)

## IDENTIFYING COMMUNICATIONS OPTIONS

*Policy goal: Pass legislation to increase funding for school-based health centers.*

TARGET	COMMUNICATIONS OPTIONS *	BENEFITS OF TACTICS CHOSEN	NEXT STEPS
<p>California legislators (Senate and Assembly)  (List to be narrowed during campaign.)</p>	<p>Advocates meet with legislators or legislative staff.</p>	<p>Build relationships with decision makers.</p> <p>Find legislative co-authors.</p>	<ul style="list-style-type: none"> <li>• Approach legislative offices for appointments.</li> <li>• Select and prepare allies to participate.</li> <li>• Prepare materials.</li> <li>• Plan for follow-up after meetings.</li> </ul>
	<p>Participate in policy hearings or hold public events.</p>	<p>A chance to publicly make the case for the policy solution from multiple perspectives.</p>	<ul style="list-style-type: none"> <li>• Secure committee hearing or plan event.</li> <li>• Invite allies and policy experts to testify.</li> <li>• Prepare materials.</li> <li>• Identify key reporters to contact about policy hearings and public events.</li> <li>• Prepare press materials.</li> </ul>
<p>Governor</p>	<p>Advocates meet with key health staff.</p>	<p>Build relationship with decision makers.</p> <p>Chance to understand implementation challenges.</p>	<ul style="list-style-type: none"> <li>• Approach offices for appointments.</li> <li>• Select and prepare allies to participate.</li> <li>• Prepare materials.</li> </ul>
	<p>Letter and e-mail writing campaign.</p>	<p>Strengthen and demonstrate the base of supporters.</p>	<ul style="list-style-type: none"> <li>• Community organizing meetings to decide messages, templates, timelines.</li> </ul>

\* Additional media options listed on the timeline chart

## MATCHING YOUR TARGET TO A MEDIA OUTLET

### 1. Our policy goal is to:

*Pass legislation to increase funding for school-based health centers.*

### 2. The target (person or institution) that can make this change is:

*The governor and members of the California State Legislature.*

### 3. The media outlets that could reach this target are:

*Since the legislative author is from San Francisco, our first media target will be Bay Area news outlets to champion our author's legislative leadership.*

*Once the legislative session begins and the legislative leadership has been chosen, we will target media outlets in key legislative districts such as those of the newly elected leaders of the senate and assembly and the districts of legislators chosen to serve on the health and fiscal committees.*

*Throughout the legislative session we will target the majority of agenda-setting and high-circulation news outlets representing large population centers in the state in order to encourage support from legislators throughout California.*

*As the debate heats up, we will prioritize news outlets in the districts of legislators who hold swing votes on key committees who have not yet committed to the policy changes.*

#### a. Newspapers (Daily, Weekly, Monthly)

**National:** *Washington Post (given link to national school health legislation)*

**State:** *Sacramento Bee, Los Angeles Times, San Francisco Chronicle, Modesto Bee, Fresno Bee, San Jose Mercury News, San Diego Union Tribune*

**Local:** *San Francisco Chronicle, Oakland Tribune, Marin Independent Journal (to give support to primary author). Others TBD once legislative debate begins.*

**Ethnic media outlets:** *La Opinion*

#### b. Radio Stations and Programs

**National:** *NPR (given tie-in to national school health legislation)*

**State:** *NPR California Report (given Sacramento policy audience)*

**Local:** *KCBS, KGO (all-news stations in the San Francisco Bay Area). Others TBD once legislative debate begins.*

**Ethnic media outlets:** *Univision, Sing Tao Radio (Cantonese and Mandarin) (given the ethnic composition of the author's legislative district)*

### **c. Television Stations and Programs**

**National:** “The Today Show” (NBC), “Good Morning America” (ABC), “CNN Newsroom” (CNN)  
(given tie-in to national school health legislation)

**State:** *California Connected* (Public television news program produced through a collaboration of four PBS stations: KCET-Los Angeles, KPBS-San Diego, KQED-San Francisco and KVIE-Sacramento) (important for Sacramento policy audience)

**Local:** Bay Area affiliates of major networks including KPIX (CBS), KGO (ABC), KNTV (NBC), KTVU (FOX)

**Ethnic media outlets:** Univision-TV

**Cable programs:** “Comcast Local Edition” (Comcast)

### **d. Alternative Press**

**Online options (Web sites, blogs, listservs):** *California Healthline* (California HealthCare Foundation’s online health news digest, announcement of school health reports), *Alternet.com*, *Salon.com*, *NewAmericaMedia.org*

**Professional or trade publications:** *Newsletter of the Association of School-Based Health Centers*, *Youth Today*, *Public Health and Health Care Journals*, *California School Nurses Organization*, *California School Boards Association*, *California Teachers Association* (primarily to reach potential allies, rather than the primary target)

**Community or organizational newsletters:** PTA newsletter

## CREATING A MEDIA ADVOCACY ACTIVITY TIMELINE\*

*Goal: Pass legislation to increase funding for school-based health centers.*

	POLITICAL TIMELINE	ADVOCACY ACTIONS	POSSIBLE NEWS HOOKS	POSSIBLE MEDIA ACTIONS	PREPARATION NEEDED
<b>JANUARY</b>	Governor submits budget to the legislature.	<p>Testify at budget hearings.</p> <p>Start letter-writing campaign to the governor and members of the budget committees.</p>	What will the new year bring for children?	<p>News event where parents, health officials, school administrators describe what children got for Christmas: a lump of coal or a new year of access to health care.</p> <p>Press release discussing how current school-based clinics will be affected by the governor's budget proposal.</p>	<p>Analyze budget.</p> <p>Identify schools to host an event.</p> <p>Prepare materials and train spokespeople.</p> <p>Prepare press kit.</p>
<b>FEBRUARY</b>	Deadline for new legislation to be introduced.	Introduce legislation to expand the number of services offered at current school health centers and to authorize new health centers.	<p>Presidents Day: opportunity to describe federal leadership on children's immunization funding and tie this to the need for school health centers as a location for such services.</p> <p>National Children's Dental Health Month</p>	<p>Release a report on how few California schools have health centers or school nurses available.</p> <p>Include information on the need to expand dental health services in school-based health centers given the low rates of dental insurance in California.</p>	<p>Research location of school health centers and services provided.</p> <p>Prepare publication and press materials.</p>

\* Creating a timeline is a way of identifying key moments in the political process or opportunities in the news calendar far enough in advance that you can prepare and act effectively. You are charting your options, not setting them in stone.

	POLITICAL TIMELINE	ADVOCACY ACTIONS	POSSIBLE NEWS HOOKS	POSSIBLE MEDIA ACTIONS	PREPARATION NEEDED
<b>MARCH</b>		<p>Local community organizing with parents, school officials, health providers.</p> <p>Legislative visits in Sacramento to gain co-sponsors.</p> <p>Youth briefing at the Capitol during spring break.</p> <p>Testify at policy hearings.</p>	Spring break	<p>Release maps of the availability of school health services by legislative district.</p> <p>Create an awards ceremony for legislative leaders on school health issues.</p>	<p>Identify key legislators and map against location of school health centers.</p> <p>Identify and train spokespeople.</p> <p>Prepare and release press materials.</p>
<b>APRIL</b>	Legislative recess	Visit district offices of key legislators.	<p>April 15: Taxes due</p> <p>Cover the Unisured Week</p> <p>Asthma Awareness Month</p>	<p>Pitch news stories on how to spend the collected taxes on school health services and children's health insurance programs. Let reporters know that your legislation would increase the financial stability of school health centers by making it easier for them to receive reimbursements from health insurance plans.</p> <p>Show children getting asthma screenings and treatment at school health centers.</p>	Prepare social math on what services can be provided to children for a relatively small portion of the budget.

	<b>POLITICAL TIMELINE</b>	<b>ADVOCACY ACTIONS</b>	<b>POSSIBLE NEWS HOOKS</b>	<b>POSSIBLE MEDIA ACTIONS</b>	<b>PREPARATION NEEDED</b>
<b>MAY</b>	Budget revision released.		Mother's Day	<p>Pitch stories on value of school health centers to the family. Include details on parent involvement in school health centers.</p> <p>Letters to the editor from mothers saying the best gift would be healthier kids.</p>	<p>Prepare talking points on how budget revisions affect children's health and school health centers.</p> <p>Develop talking points on parent engagement in school health centers.</p> <p>Identify mothers willing to sign letters to the editor.</p> <p>Train spokespeople in pitching stories to reporters.</p>
<b>JUNE</b>	Deadline for the legislature to pass the budget.	<p>Testify at policy and budget committees.</p> <p>Supporters mobilize at events in districts of key legislators statewide.</p>	<p>Father's Day</p> <p>End of the school year.</p>	<p>Letters to the editor from fathers saying the best gift would be healthier kids.</p> <p>Issue a report card on how well legislators did in caring for children's health.</p>	<p>Prepare report card.</p> <p>Identify fathers willing to sign letters to the editor.</p> <p>Identify and train spokespeople.</p> <p>Prepare and release press materials.</p>
<b>JULY</b>	Summer recess			Pitch stories to highlight the status of school health center legislation.	Identify target outlets in districts of key legislators.
<b>AUGUST</b>	Legislature adjourns after passing or suspending remaining bills.		Start of school	Pitch story: school health centers put care where the kids are and promote school success.	Prepare profile of principal talking about value of school health centers.

	<b>POLITICAL TIMELINE</b>	<b>ADVOCACY ACTIONS</b>	<b>POSSIBLE NEWS HOOKS</b>	<b>POSSIBLE MEDIA ACTIONS</b>	<b>PREPARATION NEEDED</b>
<b>SEPTEMBER</b>	Governor to sign or veto bills by September 30.			<p>Invite reporters to tour current facilities and conduct interviews with parents at schools without health services.</p> <p>Issue press release on the outcome of legislation.</p>	<p>Identify and prepare schools to profile.</p> <p>Prepare press releases.</p>
<b>OCTOBER</b>			Halloween	<p>Issue a report entitled “Are we tricking our children or treating them well?”</p> <p>Create a report assessing how candidates stand on children’s health.</p>	<p>Research and create reports.</p> <p>Prepare press materials.</p>
<b>NOVEMBER</b>	Election Day		American Diabetes Month	Pitch stories on the importance of school-based health centers in preventing, screening for and managing diabetes in children.	
<b>DECEMBER</b>					Prepare for new legislative cycle.
<b>JANUARY</b>	Legislation enacted in previous year becomes effective.			News event to celebrate legislative success last year or press interviews to call for new commitment in the coming year.	

## 7

# TIP 5: Invest in the Trip



*Build the capacity of your staff and allies to carry out the plan.*

The ACTION assessment (Worksheet 1) discussed earlier should help you take stock of your strengths so you can use them wisely throughout the campaign. By cataloging your challenges as well, you can learn what is required to overcome those obstacles. You can invest in organizational capacity by supporting staff and allies, conducting research, producing materials, and cultivating relationships with reporters. Even if your plans change, many of these investments will support a range of campaigns in the future.

Before making the list of possible investments, consider your current budget.

- **What resources do you invest in media advocacy efforts (staff time, materials development, media engagement activities)?**
- **How can these investments be most effective?**
- **What new resources might you attract (donations, collaborations with allied organizations)?**
- **How would you prioritize new media advocacy investments?**

## Staff and Allies

Who makes and carries out your media advocacy decisions? List everyone from those who speak directly to reporters to those working behind the scenes. Include staff members, board members, professional colleagues, volunteers and allies. Keep track of the role each person plays and where you need additional help. Include staff members or allies who can:

- **speak with reporters**
- **provide expert testimony**
- **track news coverage and media contacts**



## Beyond Authentic Voices

To illustrate health policy debates, reporters contact advocates looking for authentic voices, people with direct experience of the problem. Organizations learn to keep contact information for people who can respond to such requests. The Long Beach Alliance for Children with Asthma (LBACA) did even better. They trained a group of moms whose children have asthma to be strong community organizers and leaders in the fight to control the diesel exhaust at Long Beach ports. The LBACA moms are effective spokespeople for many news stories because their families suffer directly from the diesel exhaust. They know how to link their personal stories to the policy goal they seek. They've become a political force by walking the halls in Sacramento pushing for legislative action on clean air policies. Learning to be an effective spokesperson helps you talk to reporters and policymakers alike. By investing in leadership training, LBACA simultaneously strengthened its communications and advocacy capacity.



- **prepare advocacy and press materials**
- **maintain the Web site or send out advocacy alerts by e-mail**
- **engage in community organizing**

Ask what training, equipment or technical assistance could help each person's work. Do colleagues need spokesperson training or a media contact database? As the sidebar on the Long Beach Alliance for Children with Asthma shows (left), investing in those who make your case can make all the difference.

## Research

Successful advocacy campaigns can include many types of research. You should plan ahead to have the time to conduct research yourself or collect what already exists. What research can help you make your case effectively with potential allies, policymakers and the news media? Consider what obstacles, arguments and questions you will face. What information will help you make better decisions or explain the need for your policy solution? Some options include:

- **Issue research** on the problem you want to fix. What causes the problem? Who does it affect? What are the consequences?
- **Policy analysis research** to explore the potential solutions. What are the options? How would each work? What would it take to put in place?
- **Political research** to identify potential opportunities and obstacles. Who is likely to support this policy? Who might oppose it? What will the opposition say?
- **Communications research** into how your issue is understood by key audiences. This may include polling, focus groups or in-person interviews.

- **News research** that examines how your issue is currently being covered. (See Monitoring Media Coverage below.)
- **Tactical research** to know what each potential strategy or tactic will require. For example, what budget will you need to purchase a paid ad or host a news event?

Release the research you gather strategically to advance your advocacy goals. The California Center for Public Health Advocacy, for example, often releases data by legislative district when they are proposing a bill to address a community health problem.

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## MONITORING MEDIA COVERAGE

If you want to be taken seriously as a credible source for reporters, then take the media seriously. Monitor news coverage to see who reports on your issue, what they cover, and how it could be expanded to include your perspective or policy solution. Since your goal is to get the attention of particular policymakers, monitor the news outlets they listen to, read or watch. As an advocate, you need to know what's in the news, why it's there and how it's being discussed. This means reading the paper, watching the news, and/or listening to radio news broadcasts from a critical perspective.

### → Is your issue being covered?

You need to know whether or not your issue is in the news.

### → If not, are other issues being covered that relate to your issue?

It is often possible to piggyback on a related topic to attract attention to your issue.

### → What are the main themes and arguments presented on various sides of the issue?

If your issue is covered, it's important to consider how it's covered so that you can better anticipate how it will be covered in the future and how to help shape or frame that coverage.

### → Who is reporting on your issue or stories related to it?

Be sure to note the names of journalists who are reporting comprehensively on the subject, as well as those who need more information to improve their reporting.

### → Who are appearing as spokespeople on your issue?

Knowing who is speaking on the issue can help you identify gaps to be filled and anticipate arguments you'll need to counter.

*Your media advocacy plan should address both how you will define your messages and what materials you will use to convey them.*

→ **Who is writing op-ed pieces or letters to the editor on your issue? Which side are they taking?**

Opinion pieces have particular impact because these sections are considered to reveal the pulse of the community. Policymakers often turn to opinion sections to see what the community is concerned about and what positions people are taking.

→ **Are any solutions to the problem presented?**

Often news focuses on the problem without presenting solutions or presents solutions you don't agree with. Knowing this helps you plan how best to inform journalists about what you think should be done about your issue.

→ **Who is named or implied as having responsibility for solving the problem?**

Is your target named in the coverage? You will need to know whether the news spotlight is already fixed on your target or whether getting that attention will be one of your challenges.

→ **What stories, facts or perspectives could help improve the case for your side?**

While advocates tend to put a lot of faith in facts, it is not enough. Facts must be combined with compelling stories that illustrate the need for the policy solution.

→ **What's missing from the news coverage of your issue?**

An important part of monitoring the media is applying your intimate knowledge of the issue to determine what is not there that should be. Knowing what's missing will help you fill these gaps in your future media work.

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## **Materials**

Your media advocacy plan should address both how you will define your messages and what materials you will use to convey them. Your message strategy will be influenced by factors such as how your issue is already framed in the news, your target's position on your policy, and what values support your solution. Your core message should answer three questions:

- 1. What is the problem?**
- 2. What is the solution?**
- 3. Why does it matter?**

Your answers convey who you think is responsible for solving the problem and present the policy change you want to see. How you arrive at these answers is discussed in Module 3 on framing and message strategy. The challenge for most advocates is shifting the debate past a focus on individual responsibility to illustrate the role of institutions, such as government or business, in preventing or solving community health problems.

What materials you need to convey the message depends on where you will make your case. Do you need talking points for private meetings with policymakers or briefing materials for reporters covering your policy hearings? Review your overall, media and media access strategies and make a list of what you may need. The sample list below should get you started. Consider whether your current materials can be revised to support your advocacy goals. Make sure that everything you use in your campaign reflects your message and is carefully designed to reach your target audience. (You can use Worksheet 8 to track the materials you create.) Your primary target is the person or institution with the power to act on your policy goal. You will also develop materials to reach your secondary target, those who can put pressure on your primary target.

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## MATERIALS TO MAKE YOUR CASE

- **fact sheets** that describe your issue and policy solution
- **compelling stories** that illustrate the need for this policy
- **talking points** tailored for each type of spokesperson
- a **tip sheet** with answers to frequently asked and hard-to-answer questions
- a **Web site** providing information to allies, policymakers and reporters
- a **briefing sheet** with quotes from allies, political leaders and organizations on why they support the policy solution
- **media kits** including news releases, fact sheets, contact information for spokespeople, and background information on your organization
- **social math** that communicates your data in accessible ways
- **visuals** that compellingly illustrate the problem and policy solution
- **sample letters to the editor** or **opinion pieces**



## Making the Most of Advocacy Events

When the Californians for Healthy Kids campaign wanted to highlight the need to secure health insurance for all children in California, they held a town hall meeting. More than 4,000 supporters from across the state, legislative and business leaders, and the Secretary of California's Health and Human Services Agency attended and all publicly pledged their support for the goal of insuring all children in California. The day was designed to be newsworthy. Reporters were given press kits, a range of people to interview, and the compelling visual of 4,000 family members and advocates showing their support. The event attracted substantial coverage in Sacramento and local news outlets.

PICO California, one of the town hall meeting's sponsors, wanted the event to have an impact beyond one news cycle. PICO, which stands for People Improving Communities Through Organizing, knew policy change would only happen from extended pressure throughout the legislative cycle. They arranged for the advocates to walk the halls in Sacramento, making their case directly to legislators. PICO then made sure the commitment of over 4,000 advocates that day wouldn't be easily forgotten. They parlayed the power of the event, including the public statements of support by key policymakers, into a publication and e-flick that were used to educate journalists and hold policymakers accountable for their promises throughout the legislative session. This smart communications choice gave advocates an easy way to remind legislators that they represented many more committed Californians than were sitting beside them on any particular day.



Develop as much as you can before the policy debate heats up. Create templates for media kits that can be filled in close to the event. Brainstorm possible hard questions so you have time to debate your answers and craft the best ones. As the Californians for Healthy Kids example shows, investing in making your case well can yield benefits over the course of your campaign (see sidebar left).

## Relationships with Reporters

Cultivate and maintain relationships with selected journalists. The time spent getting to know the specific needs and interests of reporters will pay off in more comprehensive coverage of your issue and greater responsiveness when you have news to share. Include the time and staff needed for this activity in your strategic plan since it must be done over time, not right before you want to create news.

**1. Identify the right media outlets for your target audience.** This will help you prioritize which reporters to contact. If your target is a business leader, you may want contacts at industry publications, local business newspapers, the chamber of commerce newsletter and radio programs with a business focus. Ask your target, or people who know your target, what news he or she reads, listens to or watches.

**2. Monitor selected news sources.** Designate staff to monitor the targeted news sources. You can do this electronically by using key word searches on sites that send results via e-mail. Start with the Web sites of selected outlets or use services such as Google News or Google Alerts.

**3. Harvest the bylines for a media contact database.** Use the news you collect to create a list or database of all journalists covering the issue. Remember to include names, affiliations and



# 8

## TIP 6: Take Advantage of Opportunities

*Planning your media advocacy strategies early and building the capacity of your staff over time will pay off when opportunities arise.*



You have put your plan on paper, now put it into action. Specify who should do what, by when. Many of your investments in developing strategy or building capacity will happen continuously over the campaign. That planning comes to a head when you decide to create news. Hopefully, the coverage catapults your policy goal into public discussion effectively. As Module 4 on media access strategy discusses, you can get your issue into the news in multiple ways:

- **Create news** by doing something that is newsworthy. This can include issuing a report, presenting a demand or holding an event.
- **Piggyback on breaking news** by reacting to news of the day with a story of your own. Advocates can pitch related stories to reporters or submit opinion pieces.
- **Place paid advertising in target publications** and follow up with a pitch to reporters about the goals of your political strategy.
- **Submit opinion pieces** such as letters to the editor or op-eds.
- **Contact editorial boards** to ask them to write editorials supporting your policy goal.

Planning your media advocacy strategies early and building the capacity of your staff over time will pay off when opportunities arise.

# TIP 7: Don't Be Afraid to Change Direction

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TIP  
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Your media advocacy plan isn't chiseled in stone. Breaking news or shifting politics may call for a change of course. Re-evaluate your goals, strategies and situation often. The ultimate success of your campaign is having your policy enacted, but you can evaluate intermediate objectives such as:

- **your target's response to your communications efforts**
- **the number of news stories generated that communicate your perspective**
- **the frequency with which reporters contact you as a trusted source**
- **the strength of your internal capacity or communications protocols**
- **the appropriateness of your strategies given political changes or the shifts in public debate**

Being strategic means changing course when necessary. The largest strategy shifts come when you develop a new overall strategy. Choosing a new target or policy goal requires rethinking your media, message and media access strategies as well. There are no easy answers in strategy development. Every step takes careful thought and has unique benefits and risks.

As advocates working to influence the governor's priorities on nutrition and physical activity learned, reassessing goals in the context of current politics means refashioning messages and access tactics (see sidebar on page 38).

*A truly strategic media advocacy plan is never fixed, but evolves as your advocacy campaign evolves.*



## Influencing Policy With and Without Media Attention

The stars aligned to prevent obesity in California in August 2004. The governor, his wife, his health department, and the biggest health foundation in the state joined forces to say California had a problem and that California was going to do something about it.

When Arnold Schwarzenegger became governor of California, advocates for better nutrition and physical activity environments recognized a new opportunity. Because of the governor's personal connection to physical fitness he was likely to be receptive to obesity prevention plans. In April 2004, The California Endowment began talking with the governor's staff about the issue and the idea for a Governor's Summit on Health, Nutrition, and Obesity was born. The summit was seen as a focal point for organizing and advocacy on nutrition and physical activity not only across the state, but across government, business, public health, education, labor and philanthropy.<sup>1</sup>

### The Strategic Alliance Responds to the Challenge

In September 2004, Strategic Alliance, an organization whose mission is promoting healthy food and activity environments, convened "Listening Sessions" in Los Angeles and San Francisco. The sessions provided a forum for community members whose lives were directly affected by poor nutrition and activity environments to describe the problem and articulate solutions. The Strategic Alliance was moved by the testimony from California's residents. The steering committee for the Strategic Alliance took this testimony and matched it with public health research to draft a clear, concise manifesto for how California could take action to address its problems around nutrition and physical activity.

In January 2005, the steering committee released a draft of its manifesto, dubbed *Taking Action*, to a lively meeting at the California Childhood Obesity Conference. The Strategic Alliance weighed in, and on July 29, 2005, *Taking Action* was finalized. A few days before it was released publicly, the Strategic Alliance shared it with the leadership of the California Department of Health Services.

Next, Strategic Alliance prepared a toolkit with talking points and other materials (sample letters to the editor, a sample pitch to a reporter to highlight local angles on the Governor's Summit and *Taking Action*), convened a Web forum to discuss the upcoming summit and *Taking Action*, and began seeking endorsements.

The Web forum, held on August 23, engaged more than 75 participants from 50 sites across the state. The forum shared information about the upcoming Governor's Summit on Health, Nutrition, and Obesity and served as an organizing opportunity to come together on Strategic Alliance's *Taking Action* recommendations for the summit and beyond.

### Strategic Alliance

Promoting healthy food and activity environments  
510.444.7738 • www.eatbettermovemore.org • SA@preventioninstitute.org

#### TAKING ACTION FOR A HEALTHIER CALIFORNIA: Recommendations to Improve Healthy Food and Activity Options

Squeezed by time and money, Californians have succumbed to a lifestyle marked by physical inactivity and filled with high-fat, high-sugar foods that are more available, affordable, and convenient than healthier options. Poor nutrition and inactivity are dooming Californians to serious health problems—including diabetes, heart disease, stroke, and cancer—now and in the future. They are leading to excessive health care costs and a disabled and less productive work force. While everyone is impacted by these health concerns, limited access to healthy eating and regular activity options affects a disproportionate number of communities of color and low-income neighborhoods. The mounting costs and consequences of this public health crisis are needlessly borne by government, employers, the overwhelmed health care system, families, and individuals. This crisis is preventable, and much can be done to ensure a healthier future for our neighbors and children.

Factors that influence eating and activity are shaped by the decisions of businesses and government—decisions that are beyond the control of individual parents or families. Increasingly, government and businesses are recognizing their role and committing their institutions to be engaged in finding solutions to the epidemic. However, thwarting this crisis requires a major shift in approach for California's public and private sectors. The Strategic Alliance—a statewide coalition organized to bring urgent attention to the obesity epidemic, poor nutrition, and physical inactivity—is highlighting the roles of government and industry in crafting comprehensive solutions.

We applaud Governor Schwarzenegger's commitment to the prevention of nutrition and physical activity related disease and to expanding the circle of influence and responsibility of leaders committed to solving this community challenge. We urge businesses, government, and community groups to endorse and adopt our recommendations in addressing this community challenge. The checklist at right highlights priorities. The following pages present a more complete list of recommendations. We encourage corporate and government leaders to use their resources to draw attention to this crisis and assure that chronic disease prevention research and programs are adequately funded. By working together, we know we can reshape the way California eats, moves, and stays healthy.

#### Priority Checklist for Action by Business and Government

- Eliminate the advertising of unhealthy foods and beverages to children and youth.
- Establish grocery stores with produce and other fresh, healthy items in all low-income neighborhoods and communities of color.
- Adopt model vending policies that include access to healthy food and physical activity and to breastfeeding accommodations.
- Provide health plan benefits that cover prevention and wellness activities, including counseling, education, and access to weight-loss and physical activity programs.
- Support new methods in breastfeeding and eliminate in-hospital marketing of artificial baby milk formulas to new mothers.
- Ensure full and equitable access to all public facilities (community centers, schools, government buildings) that could house programs and services that increase the amount of daily physical activity for each community member.
- Adopt and implement "complete streets" policies and build trails to increase safety and convenience for people who walk, bicycle, or use wheelchairs.
- Ensure that children are receiving quality physical education that meets minimum state standards for duration and frequency.
- Institute healthy food and beverage standards for all food items available in preschool, school, and after-school programs.
- Implement farm-to-institution programs to make fresh, local, and sustainably grown food available at school, hospital, worksite, and other facilities.

1. For details about how the Governor's Summit fit into the larger effort in California to advocate for better nutrition and activity environments see Stephen Isaacs and Ava Swartz's *Banning Junk Food and Soda Sales in the State's Public Schools*, a public policy case study published by The California Endowment, October 2006.

The San Francisco Health Commission was the first to endorse *Taking Action*, followed by more than 50 government and community-based organizations from around California. The point of the endorsements was to disseminate the policy agenda to policymakers and to raise the visibility and legitimacy of *Taking Action* for those working directly with the governor's office on the summit.

### Approaching the Summit

As the summit neared, the Strategic Alliance was preparing its rapid-response network to generate and respond to news. The goal was to continue the momentum that was building for *Taking Action* and ensure its recommendations were part of the debate the summit would generate.

But the Strategic Alliance was also realistic and knew it faced some big obstacles. Getting news attention the day of the Governor's Summit was going to be exceedingly difficult since the governor's office, positioned to get coverage and practiced at working with journalists, would be tough competition. Plus, California first lady Maria Shriver was a media star in her own right, as were Lance Armstrong and other public figures and CEOs who would be attending the summit. Cameras would all be pointed in their direction.

Garnering news attention for *Taking Action* amid all that media-savvy competition would be tough for any group. The Strategic Alliance was just getting its media advocacy feet wet and did not yet have established relationships with California reporters; it needed another plan.

Instead of entering the fray, the Strategic Alliance ensured its message was part of the mix by taking out a full-page ad in the *Sacramento Bee* the morning of the summit. This strategically placed ad was deemed the best way to ensure the recommendations in *Taking Action* would be seen and talked about on the day of the summit.

### The Paid Ad

The Strategic Alliance solicited contributions from its members to run the ad, which trumpeted the nutrition and physical activity crisis in California and then asked, "What can business and government leaders do about it?" That question was answered with the specific remedies in *Taking Action*.

The ad put the Strategic Alliance's clear priorities in front of everyone in Sacramento that day, whether or not they attended the Governor's Summit. A key audience who did not attend the summit — California state legislators and their staffs — could find in the Strategic Alliance's ad reasonable answers to some of the toughest questions about preventing obesity.

**Poor nutrition and physical inactivity have created a public health crisis in California.**

*What can business and government leaders do about it?*

**Take Action for a Healthier California**

- Eliminate the advertising of unhealthy foods and beverages to children.
- Establish grocery stores with produce and other fresh, healthy items in all low-income neighborhoods and communities of color.
- Adopt model workplace policies that include access to healthy food and physical activity and to breast-feeding accommodations.
- Provide health plan benefits that cover prevention and wellness activities, including counseling, education and access to weight-loss and physical activity programs.
- Support new mothers in breast-feeding and eliminate in-hospital marketing of artificial baby milk (formula) to new mothers.
- Ensure full and equitable access to all public facilities (community centers, schools, government buildings) that could house programs and services that increase the amount of daily physical activity for each community member.
- Adopt and implement "complete streets" policies and build trails to increase safety and convenience for people who walk, bicycle or use wheelchairs.
- Ensure that children are receiving quality physical education that meets minimum state standards for duration and frequency.
- Institute healthy food and beverage standards for all meals and snacks available in preschool, school and after-school programs.
- Implement farm-to-institution programs to make fresh, local and sustainably grown food available at schools, hospitals, workites and other facilities.

*[For a more detailed list of recommendations, go to [www.estbettermomere.org](http://www.estbettermomere.org)]*

Today, Governor Schwarzenegger kicks off his Summit on Health, Nutrition and Obesity. There is no better time for our action plan to be used to inform the Governor, his administration, and civic and business leaders of the changes that are needed to stem the obesity crisis. Join us! Send in the coupon today.

**Strategic Alliance**  
Promoting healthy food and active environments

*Together we can ensure a healthier future for California.*

**Yes!** I/we endorse Taking Action for a Healthier California and encourage Strategic Alliance to promote it among state government, business and civic leaders.

Name \_\_\_\_\_  
Organization \_\_\_\_\_  
Street address \_\_\_\_\_  
City/State/Zip code \_\_\_\_\_  
Phone \_\_\_\_\_  
E-mail \_\_\_\_\_  
Send to: The Strategic Alliance, 202 20th Street, Oakland CA 94612

The ad also provided an opportunity to recruit new members to the Strategic Alliance with a “tear off” form that readers could send in. Many did, although that was not the primary reason for the ad. The key objectives for the ad were to 1) put the *Taking Action* priorities in front of important audiences in California’s capitol and 2) let those audiences, and the governor, know that the Strategic Alliance was serious about its goals.

## The Summit and Beyond

At the invitation-only summit, the governor signed legislation the Strategic Alliance had supported. He announced his “Vision for California” and solicited “Commitments of Significance” from business leaders. Summit working groups from different sectors discussed various prevention approaches and listened to Maria Shriver and Dr. Phil.

Once the summit concluded, the Strategic Alliance held a conference call, “Live from the Governor’s Summit,” to engage its members from around the state who had not been to the invitation-only event. Members who had attended announced that the governor’s vision largely reflected the priorities in *Taking Action*: 7 out of 10 of the governor’s vision statements were identical to *Taking Action*. The Strategic Alliance’s influence had been felt.

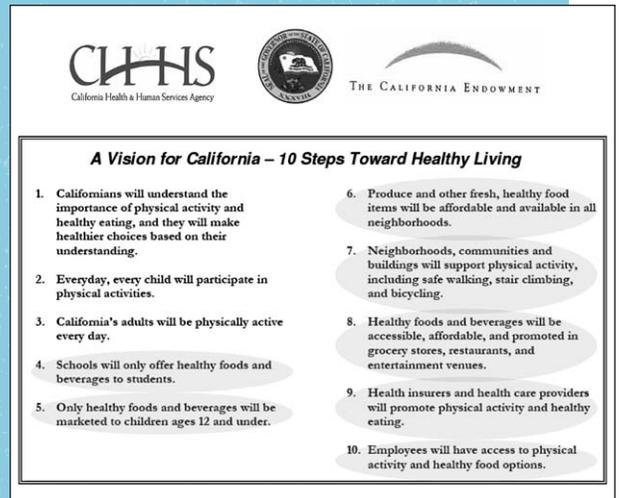
The day after the summit, the rapid-response team drafted and distributed to members of the rapid-response network examples of letters to the editor to follow on the news coverage of the summit. The team worked with Strategic Alliance members to submit their letters to the editor, but the real response would come on the one-year anniversary of the summit.

## One-Year Anniversary

In public health the challenges of chronic disease are faced every day, but that doesn’t mean these crucial problems are news every day. Anniversaries are one way to mark a point in time and make a chronic problem newsworthy. The Strategic Alliance began working with the Berkeley Media Studies Group in June to prepare for the one-year anniversary of the Governor’s Summit on September 15, 2006.

The point was not simply to create news on the anniversary; that is never the point of media advocacy. Media advocacy is always about using news attention to create environmental change, usually policy change. For the Strategic Alliance, this meant pushing the policy priorities it outlined in *Taking Action*, which had already had an effect on the Governor’s Summit by influencing his vision statement. The Strategic Alliance wanted to keep up the pressure and increase its influence on the governor’s priorities.

The Strategic Alliance decided to apply pressure by assessing what progress had been made since the previous year’s summit. It began by interviewing more than 30 local leaders and organizations working on nutrition and activity around the state. These interviews formed the basis for a report on where California stood and where the state needed to go. The report would be the centerpiece for a news release on the anniversary of the Governor’s Summit.



By August 2006 the Strategic Alliance began circulating a draft of the report. The rapid-response team began strategizing about who good spokespeople might be and how to release the report. The team recruited spokespeople from around the state willing to talk with reporters about the components of the report, now titled *Recommitting to Health*.

The governor's office got wind of Strategic Alliance's upcoming report and asked to see it before its release to the press. This was important: even without news coverage, the governor's office was interested in what the Strategic Alliance had to say about its progress.

### No News is Good News?

There was much debate about *Recommitting to Health*, on everything from its title to its tone. Some members of the Strategic Alliance wanted to come down hard on the governor for not moving far enough or fast enough on the *Taking Action* priorities or his own "Vision for California" in the year that had passed. But others were concerned that an aggressive release would anger the governor, who had clearly made a commitment and taken some positive steps. Plus, there was still legislation sitting on his desk that Strategic Alliance members wanted him to sign.

The Strategic Alliance decided its news release would emphasize the progress made since the summit. Downplaying the controversy made the report less newsworthy, but it clearly detailed the work yet to be done to improve nutrition and activity environments. The Strategic Alliance emphasized the influence it had by developing its policy objectives with input from stakeholders across the state, presenting those policy objectives directly to the committee and to the governor's staff, and keeping its members well informed. Ultimately, this strengthened the relationships within the Strategic Alliance and cemented its role as a key stakeholder as the governor's office pursues the issue. The win, for the Strategic Alliance and its cause, was having an impact on the governor's priorities and having the ability to influence those priorities in the future.

The Strategic Alliance announced this victory in its October 2006 newsletter.



**Visit us online!**  
Spread the word!  
Forward this to a friend and encourage them to join.

**Update your contact information**  
We invite your feedback:  
SA@preventioninstitute.org

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**Strategic Alliance Newsletter**

(October 2006)

*In this Edition:*

**Featured Stories**

- **Strategic Alliance Victory!**  
On September 12th Strategic Alliance released **Recommitting to Health**, a report assessing the state's progress since last year's **Governor's Action Summit on Health, Nutrition, and Obesity**.
- **Strategic Alliance Seeking Nominations for Journalism Award**
- **Legislative Updates**
  - Governor Signs School Breakfast Legislation
  - Proposed New WIC Food Package
- **In the News**
  - Most Public School Children Exposed to 'Junk Food' Advertising
  - Initial Rules for Requiring More Educational Programming and Limiting Excessive Advertising to Children Have Been Approved
- **Resources**
  - Eye on Infrastructure: Parks receive grades
  - Report Evaluates Implementation of SB 19 and SB 56
  - New Resources from California Project Lean
  - New Book: *Appetite for Profit*
- **Announcements**
  - Call for Safe Routes to Schools Projects
- **Upcoming Events**

**Featured Stories**

**Strategic Alliance Victory!**  
On September 12th Strategic Alliance released **Recommitting to Health**, a report assessing the state's progress since last year's **Governor's Action Summit on Health, Nutrition, and Obesity**.

We are pleased to report that on September 14th Governor Schwarzenegger released the **California Obesity Prevention Plan: A Vision for Tomorrow, Strategic Actions for Today**. The **California Obesity Prevention Plan** strongly reflects Strategic Alliance's **Taking Action for a Healthier California** and incorporates the 10 **Taking Action** priorities. **Taking Action**, created in preparation for last year's Summit, identifies concrete steps that business and government can take to create healthier places to live and work.

Each of the 10 priority recommendations in **Taking Action** is included in the state plan, which is "meant to serve as a springboard for government, business, voluntary and philanthropic sectors to convert fragmentation into collaboration and synergy, to carefully align and invest resources, and to create a shared response to a societal crisis." The plan also recognizes that "choices that lead to poor nutrition and inactivity are often more available, affordable, and convenient than healthier options."

We want to acknowledge how groundbreaking these actions are, at the same time, that they are only the beginning. As a next step, it is important for all of us to continue to work together to ensure that all of the recommended actions laid out in the state plan are fully implemented and that there continue to be stronger actions to improve our health.

Please visit the **Strategic Alliance home page** for further updates, including our next **statewide members meeting**, which will take place during the **CA Childhood Obesity Conference** in January 2007.

[Back to the top](#)

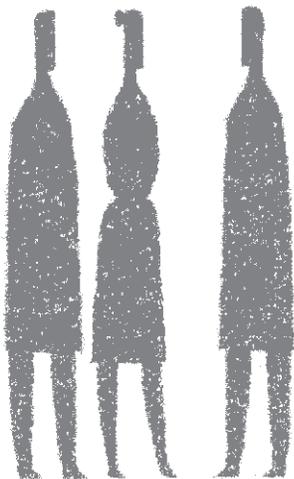
**Strategic Alliance Seeking Nominations for**

# 10

## Conclusion

Your media advocacy plan results from a series of strategy discussions and decisions. The process of developing the plan forces you to thoroughly assess your overall strategy. Take every step to its logical conclusion: If everything turns out as you hope, where will you be? Also think of contingencies. If everything doesn't happen as you hope, what will your next step be? These brainstorming sessions will sharpen your thinking and enrich your plan. The discussions will lead to decisions, decisions to actions, and actions to improvements in community health.

The plan we've outlined will strengthen your advocacy efforts as you and your colleagues work to improve health and health care in communities across California.





# 11

## Resources

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ACTION Plan handout

Dorfman, L. “Using Media Advocacy to Influence Policy.” Chapter 15 in R. J. Bensley & J. Brookins-Fisher. (Eds.) *Community Health Education Methods: A Practitioner’s Guide (2nd edition)*. Sudbury, MA: Jones & Bartlett Publishers, 2003.

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

#### The Strategic Alliance

[www.preventioninstitute.org/sa](http://www.preventioninstitute.org/sa)

Kay, Jane. “Old MUNI buses past ‘useful life,’ Groups’ survey finds 1 in 3 diesel vehicles should be replaced.” *San Francisco Chronicle*, April 1, 2003.

Matier, P., and A. Ross. “Anti-diesel group fuming after MUNI rejects ad.” *San Francisco Chronicle*, June 16, 2003.

Santiago, Amor, and Ellen Wu. “Downtown residents need access to healthful foods.” *San Jose Mercury News*, February 13, 2006.

### Strategic Communications Guides

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Bray, Robert. *SPIN Works! A Media Guidebook for Communicating Values and Shaping Opinion*. Independent Media Institute, 2000.

*Breaking Through to Great: Smart Strategies for Developing Winning Communications Campaigns.* Spitfire Strategies, 2004.

*Communications Toolkit: A guide to navigating communications for the nonprofit world.* Cause Communications, 2005.

Cutting, Hunter, and Makani Themba-Nixon. *Talking the Walk: A Communications Guide for Racial Justice.* Oakland, CA: AK Press, 2006.

Goodman, Andrew. *Why Bad Ads Happen to Good Causes and How to Ensure They Won't Happen to Yours.* Cause Communications, 2002.

*A Room with a Viewpoint: How to Create an Online Press Center That Reporters Return to Again and Again.* Fenton Communications, 2006.

Salzman, Jason. *Making the News: A Guide for Nonprofits and Activists.* Cause Communications, 2003.

## **Organizations**

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### **Berkeley Media Studies Group**

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

### **Communications Consortium Media Center**

[www.ccmc.org/main.htm](http://www.ccmc.org/main.htm)

### **Fenton Communications**

[www.fenton.com](http://www.fenton.com)

### **FrameWorks Institute**

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

### **Green Media Toolshed**

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

### **Media Alliance**

[www.media-alliance.org](http://www.media-alliance.org)

### **The Opportunity Agenda**

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

### **The Praxis Project**

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

### **Public Media Center**

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

**The Spin Project**

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

**Spitfire Strategies**

[www.spitfirestrategies.com](http://www.spitfirestrategies.com)

**Media Resources**

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**Ad Council Public Service Events Calendar**

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

**Bacons Media Directories**

[www.bacons.com](http://www.bacons.com)

**Lexis-Nexis Subscription Service**

[www.lexis-nexis.com](http://www.lexis-nexis.com)

**New America Media**

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

**On the Media (National Public Radio)**

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

**PR Newswire**

[www.prnewswire.com](http://www.prnewswire.com)

**Business Wire**

[www.businesswire.com](http://www.businesswire.com)

**News Outlets and Services**

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Many local TV stations syndicate stories to other stations around the state. Several public radio stations (e.g., KPBS-FM in San Diego or KQED-FM in San Francisco) produce programs to be broadcast state-wide on other stations. Look for these opportunities.

**News Services and Syndicates**

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**Altnet**

[www.altnet.org](http://www.altnet.org), (415) 284-1420

**Associated Press**

[www.ap.org](http://www.ap.org), (212) 621-1600

**La Opinion News Service**

[www.laopinion.com](http://www.laopinion.com), (213) 896-2270

**Pacific News Service**

[www.pacificnews.org](http://www.pacificnews.org), (415) 503-4170

**Reuters**

[www.reuters.com](http://www.reuters.com)

**United Press International,**

<http://about.upi.com>, (202) 898-8000

**Newspapers**

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**Bakersfield Californian**

[www.bakersfield.com](http://www.bakersfield.com), (661) 395-7384

**Chico Enterprise Record**

[www.chicoer.com](http://www.chicoer.com), (530) 896-7754

**Contra Costa Times**

[www.contracostatimes.com](http://www.contracostatimes.com), (925) 943-8235

**Fresno Bee**

[www.fresnobee.com](http://www.fresnobee.com), (559) 441-6330

**Imperial Valley Press**

[www.ivpressonline.com](http://www.ivpressonline.com), (760) 337-3447

**Inland Valley Daily Bulletin**

[www.dailybulletin.com](http://www.dailybulletin.com), (909) 483-9331

**La Opinion**

[www.laopinion.com](http://www.laopinion.com), (213) 896-2011

**Lodi News-Sentinel**

[www.lodinews.com](http://www.lodinews.com), (209) 369-7035

**Lompoc Record**

[www.lompocrecord.com](http://www.lompocrecord.com), (805) 736-2313

**Los Angeles Times**

[www.latimes.com](http://www.latimes.com), (213) 237-7092

**Marin Independent Journal**

[www.marinij.com](http://www.marinij.com), (415) 382-7271

**Merced Sun Star**

[www.mercedsun-star.com](http://www.mercedsun-star.com), (209) 385-2457

**Modesto Bee**

www.modbee.com, (209) 578-2330

**Monterey County Herald**

www.montereyherald.com, (831) 648-4352

**Napa Valley Register**

www.napavalleyregister.com, (707) 226-3711

**Oakland Tribune**

www.oaklandtribune.com, (510) 208-6300

**Orange County Register**

www.ocregister.com, (714) 796-7951

**The Press Democrat (Santa Rosa)**

www.pressdemocrat.com, (707) 526-8585

**The Press-Enterprise (Riverside)**

www.pe.com, (951) 368-9460

**Press Telegram (Long Beach)**

www.prestelegram.com, (562) 499-1337

**The Record (Stockton)**

www.recordnet.com, (209) 943-6568

**Register Pajaronian (Watsonville)**

www.register-pajaronian.com, (831) 761-7326

**Sacramento Bee**

www.sacbee.com, (916) 321-1020

**The Salinas Californian**

www.thecalifornian.com, (831) 754-4260

**San Diego Union Tribune**

www.signonsandiego.com, (619) 293-1211

**San Francisco Chronicle**

www.sfgate.com, (415) 777-7102

**San Jose Mercury News**

www.mercurynews.com, (408) 920-5444

**Santa Barbara News Press**

www.newspress.com, (805) 564-5273

**Santa Cruz Sentinel**

[www.santacruzsentinel.com](http://www.santacruzsentinel.com), (831) 429-2445

**The Sun (San Bernardino)**

[www.sbsun.com](http://www.sbsun.com), (909) 386-3891

**Times Standard (Eureka)**

[www.times-standard.com](http://www.times-standard.com), (707) 441-0507

**The Tribune (San Luis Obispo)**

[www.sanluisobispo.com](http://www.sanluisobispo.com), (805) 781-7902

**The Union (Grass Valley)**

[www.theunion.com](http://www.theunion.com), (530) 477-4203

**Ventura County Star**

[www.venturacountystar.com](http://www.venturacountystar.com), (805) 655-5825

**Wall Street Journal**

[www.wsj.com](http://www.wsj.com), L.A. (323) 658-3821, S.F. (415) 986-6886

**TV/Radio**

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**ABC**

[www.abcnews.go.com](http://www.abcnews.go.com)

**The California Channel (Sacramento Legislature)**

[www.calchannel.com](http://www.calchannel.com)

**CBS**

[www.cbs.com](http://www.cbs.com)

**NBC**

[www.nbc.com](http://www.nbc.com)

**Pacifica Radio Network (Berkeley, CA)**

[www.pacifica.org](http://www.pacifica.org) (lists local affiliates)

**NPR**

[www.npr.org](http://www.npr.org) (lists local affiliates)

**Telemundo (Burbank bureau)**

(818) 260-5700

# 12

## Worksheets

1. THE ACTION ASSESSMENT	51
2. STRATEGIC MEDIA ADVOCACY PLANNING QUESTIONS	55
3. CREATING A MEDIA ADVOCACY PLAN	60
4. IDENTIFYING COMMUNICATIONS OPTIONS	61
5. MATCHING YOUR TARGET TO A MEDIA OUTLET	62
6. CREATING A MEDIA ADVOCACY ACTIVITY TIMELINE	64
7. SAMPLE MEDIA CONTACT FORM	68
8. MATERIALS TO MAKE YOUR CASE	69

# 1. The ACTION Assessment

The **ACTION** framework helps identify organizational and strategic issues that should be discussed in the advocacy and communications planning process. The questions are broad so that organizations consider the environment in which their advocacy and communications work will take place.

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## **ACTION INVOLVES AN ANALYSIS OF:**

- Assets and Strengths
- Challenges, Barriers or Liabilities (internal)
- Threats (external)
- Intelligence (information needs)
- Opportunities
- Next Steps

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The strategic planning process should be done in a group where ideas from all concerned partners are brainstormed freely. The ideas can be refined after the group considers all the questions. From these responses, the group can develop plans with strategic objectives and achievable tasks. You may decide to develop an integrated advocacy and media advocacy plan or create two complementary plans. Either way, circumstances change and so should your plan(s).

## **A = Assets and Strengths**

**Assets** are the organizational and personal strengths that can contribute to advancing the policy goal. These might include specific topical expertise, resources such as money or mailing lists, contacts with key legislators, strong support from affected communities, relationships with reporters, volunteers, or even the reputation of groups or individuals within the coalition or community.

What assets or strengths does your organization have that might contribute to the implementation of the policy goal or the building of a successful media advocacy campaign?

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# 1. The ACTION Assessment

## C = Challenges, Barriers or Liabilities

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**Challenges** are the barriers or obstacles within and among organizations that may impede the ability to work for change. These may include lack of funding or other resources, inadequate coordination of material and human resources, possible lack of agreement on the policy issues, and lack of communication infrastructures. Depending on the group and the issue, these internal challenges may exist on two levels: barriers within each organization in the coalition and obstacles to effective work among the community groups.

What challenges, barriers or liabilities within your own organization may impede your efforts to contribute to the policy goal or implement a successful media advocacy campaign? What obstacles exist among your community's groups?

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## T = Threats

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The external social and policy environment poses various **Threats** that need to be considered. Such threats might include the activities of various organized opposition groups, lack of public understanding and support for public health oriented policies, potential for hardening public opinion against government regulation or programs, and economic problems across the state.

What external threats to the policy goal do you see as being most critical at this time? What threats may arise in the future?

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## I = Intelligence

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In order to move ahead, advocates need key **Intelligence**, or information, that is timely and clearly focused. This could include research on health issues, policy analysis of particular solutions, media monitoring, public opinion polling or specific research. Advocates also need intelligence concerning the activities and tactics of the opposition.

What specific types of information or intelligence are needed to best promote the policy goal? Imagine you are being interviewed by a reporter or countering the opposition's testimony at a legislative hearing, what information will you need to answer their hard questions?

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## O = Opportunities

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Advocates need to be on the alert for **Opportunities** to advance the policy goal. Examples might include legislation about to be introduced, the release of a major new report, an event that catapults the issue into public discussion, or the closing of some key social service program due to lack of funding. Some of these opportunities will become known through assets (extensive networks and contacts) and some will become known through the information-gathering process.

What opportunities do you know of now that might provide leverage for advancing the policy goal or attracting media attention to this issue?

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# 1. The ACTION Assessment

## N = Next Steps

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All of the above analysis leads to **Next Steps**. It is useful to think about what can be done in the short term and in the long term. Not every next step can be anticipated; however, an effective strategic plan will enhance the ability to respond to opportunities that might arise, planned or otherwise.

What are the most important next steps for your group to take to advance the overall policy goal and to develop an effective media advocacy campaign? You can build on these responses to create the objectives and tasks of your advocacy and strategic communications plans.

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## 2. Strategic Media Advocacy Planning Questions

We recommend planning your media advocacy efforts by discussing four layers of strategy: overall strategy, media strategy, message strategy and media access strategy. Discussing the key questions for each layer in order will give you a clear sense of your larger goals before you attract news attention. As your advocacy campaign changes course, you can revisit each layer of strategy.

### Overall Strategy

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What is the problem?

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What is the solution?

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Who has the power to make that change?

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What is the target's position on your policy goal?

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What allies must be mobilized to apply the necessary pressure?

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Who opposes the policy and what will they say or do?

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What advocacy actions will you take to reach or influence your target?

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## 2. Strategic Media Advocacy Planning Questions

### Media Strategy

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What is the best way to reach your target(s) at each stage of the campaign?

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.....

.....

If it is through the media, which outlets would reach your target audience?

.....

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When would media attention make a difference in the policymaking process?

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.....

.....

Who will be involved in developing your media advocacy strategies?

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.....

What communications protocol do you have in place?

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.....

How will you build your organizational communications capacity?

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How will you evaluate your media efforts and decide when to change course?

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## 2. Strategic Media Advocacy Planning Questions

How will you capture news clippings and track coverage?

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Who will you send the news clips to (journalists, allies, targets, financial contributors) and what will you say?

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How will you follow up with your target(s) after media coverage?

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### **Message Strategy**

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If your issue is currently in the news, how is it framed?

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Who is portrayed as responsible for the problem?

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Who is portrayed as responsible for the solution?

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What is left out of current coverage?

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## 2. Strategic Media Advocacy Planning Questions

Who or what types of people are quoted often?

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Who could make the case for the policy solution?

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What values support your perspective and policy solution?

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What is the most important message that would help convince your target to act?

*Make sure to answer the questions: What is the problem? What is the policy solution? Why does it matter?*

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What will you need to make your case (data, visuals, social math, policy research)?

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What will your opposition say? How will you respond to those arguments?

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## 2. Strategic Media Advocacy Planning Questions

### Media Access Strategy

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What aspects of your story are interesting, unusual or otherwise newsworthy?

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When might be a good time of year to attract attention to this story?

.....

.....

What can you do to get your story in the media?

- Create news (release a report, hold an event)
- Piggyback on a breaking story
- Use editorial strategies (op-eds, editorial board visits, letters to the editor)
- Purchase paid ads

What story elements (social math, visuals, authentic voices) can support your frame and package the story for journalists?

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What will you say when you call to pitch the story to reporters?

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How will you develop and nurture ongoing relationships with reporters? What authentic voices, information, perspectives or contacts can you offer them?

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### 3. Creating a Media Advocacy Plan

You can use the template on page 19 to guide your work.

**Organization/Coalition:**

**Policy Goal:**

**Target:**

**Allies:**

**Opposition:**

**Advocacy actions include:**

**Objective (use as many objectives as you wish):**

*Task a:*

*Task b:*

*Task c:*

*Resources needed:*

*Potential outcomes:*

## 4. Identifying Communications Options

You can use the table on page 22 to guide your work.

TARGET	COMMUNICATIONS OPTIONS	BENEFITS OF TACTICS CHOSEN	NEXT STEPS

## 5. Matching Your Target to a Media Outlet

You can use the table on page 23 to guide your work.

**1. Our policy goal is to:**

.....

**2. The target (person or institution) that can make this change is:**

.....

*(You may complete one sheet for your targeted decision maker and another for the secondary targets that can be mobilized to influence your primary target.)*

**3. The media outlets that could reach this target are:**

*(Add actual programs or columns where known.)*

*a. Newspapers (Daily, Weekly, Monthly)*

National:

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.....

State:

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.....

Local:

.....

.....

Ethnic media outlets:

.....

.....

Other:

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*b. Radio Stations and Programs*

National:

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State:

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.....

Local:

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## 5. Matching Your Target to a Media Outlet

Ethnic media outlets:

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Other:

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### *c. Television Stations and Programs*

National:

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State:

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Local:

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Ethnic media outlets:

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Cable programs:

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Other:

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### *d. Alternative Press*

Online options (Web sites, blogs, listservs):

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Professional or trade publications:

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Community or organizational newsletters:

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## 6. Creating a Media Advocacy Activity Timeline

You can use the timeline on page 25 to guide your work.

	POLICYMAKING CALENDAR	ADVOCACY ACTIONS	POSSIBLE NEWS HOOKS	MEDIA ACTIONS	NEXT STEPS
<b>JANUARY</b>			New Year's Day  Martin Luther King Day (third Monday)  Cervical Cancer Awareness Month  National Birth Defects Prevention Month		
<b>FEBRUARY</b>			February 14, Valentine's Day  Presidents Day (third Monday)  Chinese New Year (date changes)  The Oscars (date changes)  American Heart Month  National Cancer Prevention Month  National Condom Month  National Children's Dental Health Month		
<b>MARCH</b>			March 8, International Women's Day  Spring break (date changes)  March 31, Cesar Chavez Day  National Youth Violence Prevention Week (dates change)		

## 6. Creating a Media Advocacy Activity Timeline

POLICYMAKING CALENDAR	ADVOCACY ACTIONS	POSSIBLE NEWS HOOKS	MEDIA ACTIONS	NEXT STEPS
<p><b>APRIL</b></p>		<p>Passover (date changes)</p> <p>Easter (date changes)</p> <p>April 7, World Health Day</p> <p>April 15, Taxes due</p> <p>April 22, Earth Day</p> <p>Asthma and Allergy Awareness Month</p> <p>National Alcohol Awareness month</p> <p>National Minority Health and Health Disparities Month</p> <p>National STD/Family Planning Awareness Month</p> <p>Sexual Assault Awareness Month</p> <p>National Public Health Week (first full week)</p> <p>National Infant Immunization Week (last full week)</p> <p>National TV Turn-off Week (last full week)</p> <p>Cover the Uninsured Week (dates change)</p>		

## 6. Creating a Media Advocacy Activity Timeline

	POLICYMAKING CALENDAR	ADVOCACY ACTIONS	POSSIBLE NEWS HOOKS	MEDIA ACTIONS	NEXT STEPS
<b>MAY</b>			<p>May 1, May Day</p> <p>Mother's Day (second Sunday)</p> <p>May 17, Anniversary of the Brown vs. Board of Education Supreme Court decision</p> <p>Memorial Day (last Monday)</p> <p>National Physical Fitness Month</p> <p>National Women's Health Week (second full week)</p> <p>Bike to Work Week (second full week)</p>		
<b>JUNE</b>			<p>June 14, Flag Day</p> <p>Father's Day (third Sunday)</p>		
<b>JULY</b>			<p>July 4, Independence Day</p> <p>July 26, Anniversary of the Americans with Disabilities Act</p>		
<b>AUGUST</b>			<p>Back to school (late August, dates vary)</p>		
<b>SEPTEMBER</b>			<p>Labor Day (first Monday)</p> <p>September 1-7, Childhood Injury Prevention Week</p> <p>Suicide Prevention Week (second full week)</p>		

## 6. Creating a Media Advocacy Activity Timeline

	POLICYMAKING CALENDAR	ADVOCACY ACTIONS	POSSIBLE NEWS HOOKS	MEDIA ACTIONS	NEXT STEPS
<b>OCTOBER</b>			Indigenous People's Day (second Monday)  Domestic Violence Awareness Month  National AIDS Awareness Month  National Breast Cancer Awareness Month  National Health Education Week (third full week)		
<b>NOVEMBER</b>			Election Day (date changes)  November 11, Veteran's Day  Thanksgiving Day (third Thursday)  American Diabetes Month		
<b>DECEMBER</b>			December 1, World AIDS Day  Hanukkah (date changes, may begin in November)  December 10, International Human Rights Day  December 25, Christmas Day  December 26 – January 1, Kwanzaa		

To find more health-related days, weeks and months, visit the following Web sites.

**National Health Information Center** (2007 National Health Observances):  
[www.healthfinder.gov/library/nho/nhoyear.asp?year=2007](http://www.healthfinder.gov/library/nho/nhoyear.asp?year=2007)

**National Wellness Institute** (2007 Health and Wellness Observances Calendar):  
[www.nationalwellness.org/pdf/2007hoc.pdf](http://www.nationalwellness.org/pdf/2007hoc.pdf)

# 7. Sample Media Contact Form

Date: \_\_\_\_\_ Time: \_\_\_\_\_

Contact initiated by: \_\_\_\_\_ Staff  Media

Staff name: \_\_\_\_\_

Follow-up needed: \_\_\_\_\_

Follow-up needed by: \_\_\_\_\_

Follow-up completed: \_\_\_\_\_

Name: \_\_\_\_\_

Title (*reporter, producer, news director, assignment editor, columnist*): \_\_\_\_\_

Specialty areas/beats (*political, health, education, metro*): \_\_\_\_\_

Affiliation: \_\_\_\_\_

TV  Print  Radio  Online

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Request/comments/notes: \_\_\_\_\_

Add to Media List  Added to Media List Date: \_\_\_\_\_

## 8. Materials to Make Your Case

MATERIALS	TARGET	PURPOSE	MESSAGE AND KEY POINTS	NEXT STEPS (CREATE OR REVISE)







Center for Healthy Communities