

Be

H.I.P.P.

HAVE INFLUENCE ON PUBLIC POLICY



A MANUAL AND TOOL KIT ON HOW VOLUNTARY ORGANIZATIONS CAN INFLUENCE PUBLIC POLICY

*Prepared by YMCA Canada
with the assistance of
Human Resources Development Canada*

BE H.I.P.P.: HAVE INFLUENCE ON PUBLIC POLICY

This Public Policy Toolkit was generously funded by Human Resources Development of Canada (HRDC) and was designed by YMCA Canada to help YMCA leaders and voluntary sector leaders to increase their understanding of the structure, processes, priorities and key players of local, provincial and federal governments in addition to providing tools for developing and influencing public policy strategy.

Voluntary sector leaders can play a key role in influencing social change. The YMCA in Canada has had an enduring mission of being dedicated to the “growth of all persons in spirit, mind and body and in a sense of responsibility to each other and the global community”. YMCAs and YMCA-YWCAs across Canada serve over 1.5 million people and have the commitment of over 30,000 volunteers. This capacity has helped shape social change throughout the YMCA’s history.

This Public Policy Toolkit is also supported by a 2-hour e-learning module called “BE H.I.P.P. - Have Influence on Public Policy” (to be launched June 2003).

This e-learning module is available for voluntary sector leaders and future voluntary sector leaders to increase their self-knowledge of understanding public policy.

For more information on the Be H.I.P.P. Toolkit and e-learning module, contact Silvana Anania at YMCA Canada 416-967-9622 or e-mail, silvana_anania@ymca.ca.

Note: This publication does not necessarily reflect the views and opinions of Human Resources Development of Canada (HRDC). YMCA Canada has put these materials together from its own learnings and views this toolkit as contributing to collaborative learning within the voluntary sector in Canada on public policy development.

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INTRODUCTION

Most citizens continue to look to their local, provincial, and federal governments to play a leadership role in finding workable and affordable solutions to the issues of the day. In turn, governments make decisions, or form public policy, that affect societal values, laws, and regulations; the spending of tax dollars; and the well-being of individuals, families, and communities.

For voluntary organizations dedicated to the betterment of society, the ability to influence the actions of government can be critical to achieving their mission.

Voluntary sector leaders have successfully influenced governments to include equality provisions for women in the Canadian Charter of Rights and Freedoms and to create national strategies on AIDS, literacy, tobacco reduction, and youth employment. Their efforts have resulted in crime and family violence prevention strategies; protection of the rights of children, of persons with disabilities, and of the environment; the introduction of seat belt laws, smoking by-laws, and drinking and driving prohibitions.

Whether it's by monitoring government activities, advocating, lobbying, or strategic partnering, those leaders who demonstrate they understand and can influence the public policy arena are better able to support those they serve.

If you're a board member, chief executive officer, or program manager, or simply someone interested in public policy, you'll learn from this manual how to influence governments on the issues that are important to you and your organization.

Public policy can affect the work of voluntary organizations and voluntary organizations can affect public policy.



You will find in these pages:

- The rationale for getting involved in the public policy arena.
- How to get started.
- A description of how government works.
- The steps to develop and implement a public policy action plan.
- A list of do's and don'ts when seeking to influence public policy.
- A tool kit that includes a sample action plan, a self-assessment quiz, and tips for building effective relationships with the media and politicians.

This manual and tool kit is designed to help you and your organization minimize the pitfalls and overcome the barriers to successful engagement in public policy work.

“The YMCA has been active in influencing public policy throughout its 150 year history. It has built coalitions, led delegations to meet politicians, made representations to public servants, provided expert testimony to government committees, participated in public consultations, built program partnerships with various sectors and put forward proposals to decision-makers that address the issues of the day.”



GLOSSARY

ADVOCACY

To support, plead, defend a cause.

To express your views to create a shift in the environment, mobilize resources, change public opinion, or influence someone's perception or understanding of an issue.

DECISION-MAKERS

Senior public servants or municipal, provincial, or federal politicians who have the authority and power to make decisions.

GOVERNMENT RELATIONS

To monitor government actions or build relationships with elected and/or non-elected officials in order to increase their awareness about your organization.

ISSUES

Unsettled matters or problems that are of public concern.

LOBBYING

To undertake activities aimed at elected and/or non-elected government officials to influence them towards a desired action.

PUBLIC POLICY

The intentions, decisions, or actions of government.

Public policy sets out the 'what and how' of something that is to be done and may be expressed through laws, regulations, procedures, or expenditures.

STAKEHOLDERS

Groups, organizations, or sectors that have an interest or stake in a public policy issue.





WHY BE H.I.P.P.?

THE NEED TO KEEP A CLOSER EYE ON PUBLIC POLICY

The landscape affecting the voluntary sector has changed in the last decade. Several developments point to an increased need to monitor and proactively influence public policy at the local, provincial, and national levels. These include:

- **Reductions in some tax benefits and changes in the regulatory framework affecting charities.** Policy makers and regulators do not always understand the value, challenges, and contributions of voluntary organizations. Consequently, some local governments are reducing previous tax benefits.
- **Tax cuts versus social programs.** There are competing visions about the use of government surpluses. Governments are facing tough choices over whether to cut taxes or invest in new program spending.
- **Increasing importance of local government.** The federal-provincial-municipal landscape is shifting. Provincial and municipal governments are seeing increased responsibilities devolved to them without always having the needed resources to cover these new areas.
- **Changes in the role of government.** The responsibilities of public, private, and voluntary organizations are shifting as

governments assess which of their services should be out-sourced. This shift, coupled with the implementation of international trade agreements, may increase competition for services that have traditionally been the work of the voluntary sector.

If you're still debating about whether you have the time to focus on public policy, consider these reasons:

TOP TEN REASONS TO INFLUENCE PUBLIC POLICY

1. Governments may be planning changes that can negatively affect your organization's ability to fulfill its mission.
2. Government has many resources at its disposal that can be beneficial to your mission. These include information, contacts, funding, and regulatory levers. Government also has the ability to influence public opinion as well as change the conditions affecting charitable donations.
3. If you don't share your views, someone else will. There's been a dramatic increase in the number of charities in the last twenty years. Most causes have their own advocate competing for a place on the government's agenda.
4. Governments want to hear from your organization. They are looking for knowledgeable and reliable partners who are close to the real problems of people and willing to work on solutions.
5. You can advance your cause and build public trust. You are what you speak out about. Speaking out on public policy issues can increase the profile of your organization and people's understanding of what you stand for. Research shows that the more people understand charities, the more supportive they are.¹
6. Your organization has valuable experience and insights that can improve the effectiveness of government decisions and actions.



¹CCP, *Understanding Charities*.

7. Government may be interested in partnering with you to achieve common goals.
8. Governments do not have all the answers; a healthy democracy depends on the full participation of all sectors of society in its public affairs. Citizens, especially those who are marginalized, need a vehicle to participate in discussions about the future of their communities, the type of society they want, and the role of government.
9. Your donors may be wondering if you are tackling the root cause of problems by looking at how systems and structures affect the issues they are concerned about. In some cases, until the root causes are addressed, there may never be enough volunteers, staff, or resources to resolve the issue.
10. Effective public policy advocacy can result in your organization advancing its mission far beyond the number of people being served directly by your programs.

And finally, being active on the public policy front is like building up a savings account. You never know when you might need to draw on your balance. For example, it's often easier to get people's attention about issues that may negatively affect your clients or services if your organization has already created a positive impression in the community and with decision-makers.





GET STARTED

KNOW THE GROUND RULES

You don't have to be an expert to have impact. You'll need a few basic facts, a belief in your cause, and common sense.

Advocating or lobbying to advance the views of your organization is honourable and legal. It does not have to be confrontational, high profile, or controversial.

However, charities registered through the Canadian Customs and Excise Agency **need to follow the provisions of the Federal Income Tax Act** (see *Appendix A*).

What Charities CAN Do

- ✓ Engage to a limited extent — no more than 10% of the charity's resources — in non-partisan political activities that directly help accomplish the charity's purposes.
- ✓ Respond to issues raised in an election campaign by analysing and commenting on the proposals that directly relate to its charitable purpose.
- ✓ Raise public awareness provided its materials are educational, informative, reasoned and well-founded.
- ✓ Seek the support of elected officials if there is a question whether a grant is to be made or continued.



What Charities CANNOT Do

- ✗ Persuade members of the public to vote for or against a candidate.
- ✗ Support a political party.
- ✗ Distribute political literature.
- ✗ Advocate in support of policies, nor seek to inform and educate on issues that do not conform to their corporate purposes.
- ✗ Participate in political demonstrations.
- ✗ Conduct a referendum on a political issue.
- ✗ Overstep the boundary between education and propaganda (e.g. by providing one-sided information designed to promote a particular view).
- ✗ Finance political activities directly or indirectly.

“Charities lobby openly and aboveboard, without mystery or drama. They rely on facts and rational persuasion, not political clout. They don’t play politics. Charities lobby on behalf of interests broader than their own....

They lobby for citizens’ health and safety, for services for people with disabilities and the basic rights of people unable to assert those rights themselves. They lobby for tax measures encouraging donor generosity toward philanthropic purposes

Charities through lobbying bring new ideas to public attention, and advance new solutions to society’s problems. They have an important hand in shaping public policy.”

(Independent Sector 2000, www.independentsector.org)



TAKE STOCK

The more you can identify your organizational strengths and what you have to offer, the more likely you will be able to act as an equal partner with government rather than as a client.

While governments have many resources at their disposal, it's often challenging for them to keep abreast of emerging issues, be aware of the unintended consequences of their actions, and balance competing societal interests. Governments recognize that voluntary groups have much to offer.

The higher your organizational profile, credibility, and effectiveness, the more policy makers will want to have you on their side.

Here are some ways you can assess your potential contribution.

Information and knowledge

- You're an authority in your field.
- You can give front line information that decision makers need and have difficulty obtaining.
- You can share your ideas about what's working or not working, and offer alternatives.
- You can generate new research-based information through member/participant surveys, focus groups or evaluation studies.

A voice for those who might not otherwise be heard

- You can describe and convey the challenges and needs of those who often have trouble making their voices heard such as newcomers, youth, children, seniors, low-income families, and the hard-to-employ.

“With their wealth of knowledge and experience, charities can contribute significantly to public life in Canada. They can offer solutions to problems relating to their experience, and Canada would be impoverished if they were excluded from public debate or denied the opportunity to inform decision makers.”

(Frank Luellau, Canadian Fundraiser, 1997)



Innovation/Social Entrepreneurship

- You can test out new approaches to address community needs.
- You can sell your social entrepreneurship — your ability to use business-like methods to achieve social goals.
- You can mobilize resources, volunteers, and community leaders from different sectors to create viable solutions for the common good.

Strength in numbers

- You can join with others who share common goals to gain greater influence.

Recognition

- You can give public recognition to government for those actions that advance your cause.

Track record

- You have a history of delivering services, leading change, or initiating community action.

The more areas you've checked off, the greater the potential for you to be listened to and to have an impact on decision-makers.



BUILD YOUR ORGANIZATION'S PROFILE

Decision-makers are always interested in meeting with those they've read about or heard good things about. Often it's not enough to be just doing the job; you must be seen to be doing the job. Regular and ongoing communication targeted at opinion leaders and decision-makers is valuable.

You may want to add the names of community, provincial, and/or national leaders to your mailing lists to receive your newsletters, annual reports, notices of activities, and invitations to special events. No one likes to be inundated with information, so you'll want to determine which materials would be most strategic. Highlight the key messages so that readers will retain important facts and want to read more.

Make a Community Connections Inventory

Build an inventory of connections by identifying your friends and allies, those individuals who can offer information, networks, and advice. You may be surprised at the number of connections the members of your organization have. However, be sure to assess the credibility of these connections to ensure the relationship won't harm you.

Program participants or others that have benefited from your organization should also be identified as they can assist in conveying messages about the value of your organization's work. Personal testimonials can be very powerful since they provide tangible examples of impact and benefits.

Maintaining an extensive network of allies and supporters of your cause in leadership positions in various sectors cannot only open doors but can ensure your interests are represented at other tables.

Having a list of friends will also be helpful if you need to quickly rally support to take advantage of an opportunity or respond to an unexpected threat.



Assess Your Organization's Credibility

The more you are plugged into the community, and attuned to the needs of your program participants by being able to reflect their views, the stronger your credibility.

You should be aware of how other community leaders would describe your organization. Consider whether your organization has been involved in any contentious issues that may have tarnished your credibility.

If you suspect that others may be aware of any past difficulties, be ready to acknowledge them and correct any misconceptions and assumptions. Highlight the positive things you've done to strengthen your organization.

CREDIBILITY CHECK LIST

To assess the level to which your organization is trusted and valued by others, consider these questions:

- Are you seen as trustworthy, objective and politically neutral?
- Are you known or respected by the policy makers involved?
- From what do you draw your information and expertise; do you have evidence?
- Will decision-makers be interested in hearing from your organization?
- Can you legitimately speak on behalf of those you purport to represent or those affected by the issue?
- Have you spoken out before?

(from CARE; Advocacy Tools and Guidelines, Promoting Policy Change, 2001)





UNDERSTAND GOVERNMENT

WHAT MAKES GOVERNMENT TICK

Governing is about the art of the possible. It's about finding resources and workable solutions to address societal issues. Governments can be leaders but sometimes they are followers. As politicians are elected, they like to be responsive to the wishes of their constituents. Some politicians may be hesitant to be too far ahead or in opposition to the perceived views of the majority.

In addition, governments are bound by many processes and influenced by various forces. The more you understand these factors, the more you can influence them.

Government has political and administrative functions. The former is led by elected officials, focuses on strategic directions and choices, and is based on political values and ideologies. The latter function is led by public servants and is driven by values such as efficiency, transparency, and accountability. It includes managing; regulating and enforcing processes, structures, and systems; and developing policies, programs, and services.



THE DIFFERENT LEVELS OF GOVERNMENT

In seeking action by government on your issue, it's important to know whom to turn to. One level of government can tell you that your issue is not within their jurisdiction while another may make you think they can do something when they don't have the authority or power to help you.

The Canadian Parliament has the power “to make laws for the peace, order and good government of Canada” and everything not mentioned as belonging to the provincial legislatures. Sections 91 and 92 of The Canadian Constitution outline the division of powers between federal and provincial governments.

The Constitution assigns matters of “general interest” such as defence, customs and excise, to the federal government, and those of particular or local interest to the provinces (e.g. education, natural resources, hospitals, local works). Municipalities are creatures of the provinces and restricted to the authorities delegated by their provincial government.

While the drafters of the Constitution attempted to make a clear division of responsibilities in 1867, they could not have anticipated the importance of some areas such as health, immigration, and the environment. Given the complexity of today's issues, chances are that all three levels of government have an interest. But each level has different types of power, resources, and levers to effect change.

The description below gives a general outline of each level of government's responsibilities. *Appendix B* provides more specific examples of the division of responsibilities related to children, health, and immigrants.



Federal Government

- ✓ Has power to make laws for “the peace, order and good government” of Canada.
- ✓ Has a residual power over anything not listed under provincial jurisdiction.
- ✓ Can use its spending power to influence provincial areas that it believes has national repercussions (e.g. homelessness).
- ✓ Interprovincial and international trade and commerce, national defence and criminal law.

Provincial Government

- ✓ Matters of a local or private nature.
- ✓ Social security, health, education, employment, economic development, natural resources, child welfare and protection, environment, prisons.

Municipal Government

- ✓ Created by the province, restricted to the authorities delegated by the province.
- ✓ Local infrastructure (e.g. roads, sewers, bridges, water treatment).
- ✓ Local public health and social services (e.g. child care, long-term care, land use planning, transit, police and fire protection, garbage collection and disposal).

HOW GOVERNMENTS MAKE DECISIONS

While governments are driven by election promises, plans, and budgets, government leaders are often responsive to significant changes in the external environment. For example, they may change course due to public opinion, international events such as terrorism, or local developments that have national repercussions. They can be influenced by factors such as:

- Issues receiving extensive negative media coverage
- Data, research, and other new evidence



- Party politics
- Personal ambitions and goals
- The advice and actions of the bureaucracy
- Their leader, colleagues and staff
- Community leaders

There are many internal players involved in decision-making, often having conflicting perspectives and priorities. Information may be in short supply, contradictory, and not always shared widely. Decisions may need to be taken immediately, await the results of extensive public consultations, or be delayed indefinitely.

While decision-making can appear to be chaotic, governments do follow specific decision-making processes. To have influence, you need to know, respect, and use them.

For example, even when a government wants to move quickly, electoral, decision-making and budgeting cycles may limit it. It's helpful to know how to identify these decision making 'windows' or most opportune times to influence public policy.

Generally, there are four key stages in government decision-making:

1. Agenda setting
2. Policy design
3. Cabinet review
4. Legislative approval

Governments try to garner as much support or "buy in" at each stage. Stages two and four are driven more by bureaucracy while stages one and three rest with the political level.

Agenda Setting

Ideas for the setting of government priorities come from various sources such as party platforms, ministerial statements, public servants, political advisors, party research bureaus, and office of the premier or prime minister. Colleagues, friends, lobby groups, key constituencies,



opposition parties, government caucus, the media, academic think tanks, other levels of government, central agencies, consultants, research findings, and task forces also contribute their priorities.

Provincial cabinet ministers, with the assistance of such central agencies as the Privy Council Office, would agree on key areas which are then outlined in the Speech from the Throne. Once the Throne Speech is announced in the legislature, ministers then turn to their departmental officials to begin the work of implementation. Officials assess the external demands against priorities, whether resources exist or new resources are needed, legislation is affected or needed, and whether the minister has the authority to act alone.

As planning is in its initial phase here, this is the best opportunity to encourage or prevent policy outcomes.

Policy Design

This stage is primarily driven by bureaucratic staff and is the most significant stage for stakeholder input. Political input at this stage is usually limited to that of an ombudsman function; for example, ensuring citizens have access and are treated fairly.

Most policy decisions are made in small steps and in consultation with organized interests. To gain public input, the government may publish a discussion paper, undertake formal or informal consultations, or set up an advisory committee or task force.

Governments are usually strongly committed to their goals but flexible on how to achieve them. Even when a government has made political commitments, there's room to influence the policy design process.

Once widespread support is achieved, it will become harder to influence the policy.



Cabinet Review

The heaviest political scrutiny happens at this stage. Politicians assess the implications of a particular policy and ask themselves “will this achieve what we’re here to do”? Political staff usually have limited capacity to evaluate detailed policy which has been formed by public servants and stakeholders, but they will ensure the political ramifications have been considered (e.g. will this allow us to meet our promises, will it receive positive media attention, will our supporters be in agreement, how influential will the opponents be).

Legislative Approval

As the directions are now set out in a draft legislation or bill, it’s much harder to make changes at this stage except through amendments. To get to this stage, many compromises have usually been made along the way to respond to the varying needs and to get as many different interests “on side” as possible.

Consequently, the more support for a government initiative the harder it is to change it. Minor changes are more likely at this stage than major backtracking.

As government likes solutions, elected officials don’t want to hear about what they shouldn’t be doing. It’s more useful, therefore, to advise them of the unintended consequences of their planned actions and to offer workable alternatives.



LEGISLATIVE, ELECTORAL, BUDGETARY CYCLES

Timing

Timing is everything. A priority can quickly slip in importance depending on the events of the day. By reading newspapers, watching and listening to the news, and talking with a wide range of contacts, you can keep abreast of political developments and get a sense of when opportunities or threats are near. Some companies sell monthly monitoring tools that give a synopsis and assessment of government actions.

Initiatives that need cabinet decisions because they involve new resources, legislative approval, or a change in policy and direction, will follow set procedures and timing.

The Legislative Cycle

When federal and provincial legislatures or municipal councils are meeting, competition for a politician's time is greater. Their schedules are less predictable as the events of the day may require them to make last minute changes. Politicians are required to sit a certain number of days in the legislature or council, and attend committee and/or caucus meetings.

At the federal or provincial level, legislation follows a set process which includes:

FIRST READING

The proposed provisions of a new law are outlined in a bill which is introduced or tabled; there is no debate.



SECOND READING

Debate is held in the legislature on the bill's principles. It's then referred to a committee for review and the development of any needed amendments. The committee (composed of both government and opposition members) hears presentations from selected stakeholders who may also propose amendments.

THIRD READING

The bill returns from committee for final reading and a vote is then taken. If the majority of the members vote to support it, the bill passes and is sent to the Governor General to receive royal assent after which it has the force of law. In the national parliament, a bill would also need Senate approval before going to the Governor General for royal assent.

Most government websites include copies of bills and a description of their status. Committee agendas, membership lists, and proceedings are posted along with the contact information for the committee clerk who can advise on any upcoming topics and public hearings.

Electoral Cycle

Building on the adage that the electorate has short memories, governments tend to take risks earlier in their mandate and are less likely to do so closer to an election. Pushing for controversial changes may be much easier earlier in the government's mandate. It could be much harder if political leaders are facing an election in the near future and do not want to risk the anticipated backlash to their party fortunes or political careers.

Budgetary Cycle

Most new initiatives need to go through cabinet decision-making and then the budgeting process before they can proceed, unless existing resources are being used. Decisions made by cabinet then proceed to a



Treasury or Management Board made up of selected ministers who review and decide on the detailed budget plans. They will consider how much money will be needed, is it over several years or ongoing, are new funds required and warranted, how will the new funds be spent, what are the expected results and evaluation plans.

Understanding the budget cycle can help determine when it's best to intervene. As governments allocate their resources against their priorities, the best ideas can die if no funds are available.

The budget cycle usually unfolds as follows:

March - June: Preparation and review of departmental business plans.

June - August: Cabinet review of priorities.

September - October: Budget consultations undertaken with key stakeholders.

November: Tabling of departmental performance reports.

December - January: Cabinet review of budget strategy.

January - February: Final cabinet decision on budget.

February - March: Budget speech and tabling of the budget estimates.

From the above, you can see that June to September offers a better window for any influencing activities than does late fall and winter when decisions may have already been made. In addition, you will always face a challenge if you're looking for support for something that does not fit easily within one ministry or an existing program, policy, or funding criteria.



TIPS FOR COMMUNICATING WITH PUBLIC SERVANTS

Start with who you know and work your way up the hierarchy. If you're not getting the response you want, let your contact know you're going to the next level so they're not blindsided.

Take new ideas to the executive level responsible for that area (usually a Director or above).



GOVERNMENT PLAYERS

Politics is all about people. While bureaucratic processes are designed to be open, fair, and non-discriminatory; as with many other transactions, building positive relationships with the right people is helpful. It's much easier to ask for something from someone who already has a positive impression of you than from a complete stranger. The more you understand what motivates politicians, their staff, and public servants, as well as their plans and priorities, the more readily you'll be able to determine effective approaches to influence them.

Find out as much as you can about those you're dealing with (e.g. their training and background, responsibilities, activities, positions on issues, media reports).

Here's a description of "who's who" and their role in decision-making:

Members of Provincial Legislatures

- Always best to start with the representative elected from your area.
- Can help bring attention to your issue through making statements, asking questions in the legislature, or lining you up with a minister or their staff.
- Can assist in getting answers from the bureaucracy or advising on how things work.

Ministers

- First and foremost they are members of a legislature elected by constituents from a specific geographic area.
- Influenced by their constituents, party values and platform, citizens' groups, community opinion leaders and the media.

- Accountable to the legislature (provincial) or Parliament (federal) for the actions of his/her ministry.
- Selected by the premier or the prime minister for various political reasons, not necessarily an issue expert.
- Sets overall direction and priorities for the department based on government's agenda; tends to have a shorter-term perspective (e.g. 1-3 years).

Political Staff

- Can offer political advice to you on departmental and party matters.
- Serve as a gatekeeper to how the minister uses his time, who the minister meets, and how the minister might view people, issues and organizations. It can be helpful to develop a good rapport with those assistants responsible for your areas of interest.
- Usually have political connections and have been active in politics or bring specific related expertise. They look out for their minister's interests (e.g. their re-election, power and influence, constituency issues and party politics).
- Can help get information from the bureaucracy, reconsideration of an issue, or reversal of a decision. Can help ensure bureaucracy is accessible, if you feel you're not being treated properly.
- Will look at issues from the perspective of how they will be received by the media, public, and stakeholders.

Public Servants

- Support and are accountable to the government of the day.
- Analyse, consult, advise, evaluate and formulate policies for consideration by the government. Carry out its decisions, administer and enforce laws and provide government services;

Find someone who can make decisions, think outside the box, and see the big picture.

Regional officials may not always be plugged into head office developments so ask them who might have the latest information or is the decision making authority.



hired and promoted based on merit (the skills and qualifications needed for the job) which excludes favouritism or political affiliation.

- Are guided by such values as political neutrality, accountability, anonymity, responsiveness, fairness and equity, integrity, efficiency and effectiveness.
- Have different levels of accountability and decision-making depending on position in the hierarchy, and whether in a national or regional office.
- Are also differentiated by their role or function (e.g. may be in management, policy, operations, or a specialist such as a legal advisor).
- As each may appreciate your issue from a different perspective, you'll need to find the right one in terms of function, level in the hierarchy and approach (e.g. are willing to consider opportunities and alternatives, and remove possible barriers).
- Don't assume discussions with one public servant will be passed on to others you may be dealing with.

Deputy Minister

- Provides managerial, technical and financial advice to the minister; is expected to take a longer term and government-wide view (e.g. impact of decisions on society over the next 5-10 years).
- Expected to be politically neutral, yet politically sensitive.
- Has various levels of management reporting through a hierarchy (e.g. assistant deputy minister, director, manager, analyst, officer, clerk).



The Media

- Some political analysts and commentators believe that the media drives government agendas.
- Public opinion is a powerful influencer and the media is often the most influential catalyst of public opinion.
- Newspapers are widely read by politicians, their political staff, and public servants to gauge public reaction to, and the profile of, various issues.

See *Appendix C* for tips on dealing with the media.

Other Stakeholders

- The more credibility, resources, connections and profile, the easier it is for a stakeholder to get attention.
- Governments often deal with alliances, coalitions and associations. These groups can serve as an intermediary for obtaining the perspectives of many others with similar interests, and can offer a broader perspective than dealing with just one organization.



FINDING COMMON GROUND: SETTING PRIORITIES

It's easier to influence something that's already on the government's radar screen than to generate interest in something that is of low or no priority. You need to know the government's priorities and find a way to align your issue with them.

It's also easier to be heard and to have an impact when you're speaking in the language elected or non-elected officials understand and when they can easily make the link to their agenda.

Here are some common priorities shared by all three levels of government:

- Maintaining a balanced budget.
- Responding to public pressure to reduce taxes, achieve value for money, and provide greater transparency and accountability as to how funds are spent.
- Promoting economic growth and prosperity.
- Adjusting to changed responsibilities and securing adequate funds to match these.
- Facing a greater pressure to be competitive due to globalization.
- Promoting a high quality of life.
- Building a sustainable health care system.
- Creating a high quality and sustainable education system as well as highly-skilled workforce.
- Promoting economic growth and development while protecting the environment.
- Ensuring the security and safety of citizens.

You can check out the specific priorities facing all levels of government by visiting the appropriate government website. Look for key documents such as the throne speech, budget speech, press releases, recent speeches given by ministers, the premier or the prime minister, departmental business plans, or city plans.





DEVELOP YOUR ACTION PLAN

Now that you have a better understanding of government, here are seven steps to the development, implementation, and evaluation of an action plan to influence public policy.

Step 1 : Secure internal support

Step 2 : Identify goals and desired outcomes

Step 3 : Analyse your issue

Step 4 : Create key messages

Step 5 : Develop your strategy

Step 6 : Choose your tactics

Step 7 : Implement your plan — assign responsibility and determine timeframe and budget

Step 8 : Evaluate regularly, modify as required, and learn as you go

To see how far along you may already be with these steps, complete the self-assessment tool in *Appendix D*.

While the following outlines a possible process, don't worry about jumping over or skipping steps since the public policy arena is unpredictable and windows of opportunity can open and close quickly or unexpectedly. Better to take advantage of an opportunity that may arise than to be methodical about following a set process.



STEP 1 : SECURE INTERNAL SUPPORT

As you'll be committing leadership time and other resources as you strive to influence public policy, you'll need to build commitment and support within your organization among your board, staff and other volunteers. The more that volunteers and staff understand the important role advocacy can play in achieving your organization's mission and goals, the easier it will be to act in a unified manner. Far better to have debates within the organization than in front of outsiders. You don't want to raise doubts about your organization's level of commitment.

Start by building internal consensus about your goals for public policy involvement. Consider including influence and public policy as part of your organization's strategic plan and job descriptions.

Establish an Advisory Group

A public policy committee can provide a focal point for monitoring, planning, sharing updates, and determining strategies. The committee could be made up of board members as well as non-board members to bring in any needed expertise. The committee can be supported by a knowledgeable staff person to follow through and co-ordinate planned activities. Refer to *Appendix E* for a list of needed skills.

STEP 2 : IDENTIFY GOALS AND DESIRED OUTCOMES

Clearly identify what you want to achieve. The more specific you can be, the better.

A review of your strategic plan will help determine your focus and assist with setting goals and describing your desired results. For example, your board may have set as one of its strategic goals being a leader in



health, responding to the needs of children, or supporting newcomers to integrate into the community. You'll need to assess whether there's a role that government can play to help you achieve your goal.

In deciding whether to involve government, the following questions may be helpful:

- LAWS:** Is there government legislation or regulation that helps or hinders your organization's work? Does legislation need to be put in place?
- VALUES:** Can government influence public behaviour or attitudes.?
- IMPORTANCE:** Can government increase the importance society attaches to this issue?
- MONEY:** Would greater public investment assist?
- PARTNERSHIP:** Can government help build consensus across sectors?
- POLICIES AND PROGRAMS:** Are existing government policies and programs a hindrance or a help? Are new programs and policies needed?
- INFORMATION:** Does government have useful information that could assist you?
- IMPACT IF GOVERNMENT CHANGED ITS COURSE:** Would the repercussions for your organization be positive, negative, or have no effect?

CAUTION - As governments are usually keen to involve stakeholders in their plans, be careful not to get sidetracked or lose sight of your own goals, available resources, and desired timeframe.

In deciding on your focus and desired level of involvement, it's helpful to consider your goals in the context of other societal developments. A scan of the external environment can help you assess



whether current trends or public attitudes will help or prevent the achievement of your goals.

It may also be helpful to think of your involvement along a public policy continuum with monitoring government developments at one end of the spectrum and influencing changes in government direction at the other.

Here are some of the type of activities that might fit along this continuum:

- MINIMUM LEVEL:** Keeping abreast of developments in order to be well placed to respond to threats or take advantages of opportunities; for example, could entail monitoring government actions related to child care to keep abreast of any new requirements.
- MODERATE LEVEL:** Looking for funding or partnership opportunities, increasing the profile of your organization or building good relationships. For example, could involve meeting with elected and non-elected officials to ensure they are aware of your organization's contributions to child care while you also provide feedback to government on existing requirements.
- EXTENSIVE LEVEL:** Seeking policy or legislative change to existing initiatives, advocating for the introduction of new initiatives or for broader social change. For example, you may wish to map out and implement a strategy for getting government to change some aspects of current regulations or increase investment in child care.

The desired outcome will affect the time, effort, resources, potential impact, and level of expertise required. The more specific your focus, the greater your chances of success.



STEP 3 : ANALYSE YOUR ISSUE

Think of your issue in terms such as:

- Why is this a problem?
- What makes it an issue?
- What needs to be done?
- What can be done about it now?
- What will it cost to address it?
- What's the cost of doing nothing?

As most social issues are interrelated and stem from other issues, you'll need to analyse the root cause of the issue you want to tackle.

Here are some key questions that can help get at the root cause:

1. What does research and data show about who's most affected?
2. What are the views, attitudes, motivations and ideas?
3. What's being done now, by whom and what impact is it having?
4. What does the research show as being an effective approach?
5. How can you tackle the root cause?
6. Who else could possibly have a role and impact in order to tackle the root causes?
7. Does this issue go beyond your community? Are there other groups already championing this issue at a regional, provincial or national level?

Find out as much as you can about what's going on. To get a full picture and understanding of all the influencing factors, you can check for information on the Internet, look for media reports, or review public opinion data.

Public officials can also be great sources of information. Develop as many contacts as you can to gain different perspectives on how this issue is viewed by others, both those affected and those who are not.



STEP 4 : CREATE KEY MESSAGES

You'll need to identify the specific actions you want to see taken and develop your arguments for why this is a sound approach.

To develop a strong case, you'll need to show public need and support. Your message should focus on:

- What you want.
- What the benefits are to your organization and to others.
- Suggestions on how to make change.
- What you want decision-makers to do.

Here are some areas you'll need to keep in mind:

- Be able to explain the consequences of not changing course.
- Address potential concerns of your audience and the arguments made by others.
- Identify how your ideas fit in with the decision-maker's interests; if possible, link your issue to things you know they support.
- Offer new information versus what they've heard already.
- Clear up any misconceptions about your organization and its position.
- Avoid using jargon and expressions internal to your field.
- Remind politicians that your proposed action is helping them do what they said they were going to do. Show them how it fits in with their plans and responses to public concern and pressure.

The more your message is delivered in terms meaningful to government, the more likely you are to be heard. To better understand the perspectives of this audience, refer to *Appendix F*.

If you consistently bring substantive and easily understandable information, the more likely you will be able to achieve your desired goals.



Develop your story

You need to build a compelling story that brings a human face to the issue so that others can easily understand how the issue affects people.

Make it brief and accurate, based on the best factual or anecdotal evidence available. You should have a one-page description that captures the basic facts. You want to be able to answer questions such as what your organization is about, what you want, why, who will benefit, and what are the consequences of not proceeding.

For an example of how to describe your organization refer to *Appendix G - Telling Your Story*.

The Messenger

Choose an effective messenger who has knowledge and credibility, is politically neutral, and has a close link to the issue and the people affected. Consider ways to get other influential people to repeat your message.

Your spokesperson should be knowledgeable, concise, easy to understand, and have the ability to speak with passion. These are the qualities that will have impact. Consider having one or two spokespersons trained in media relations.

Board members are the best spokespersons to speak to politicians while staff are appropriate when dealing with public servants. Think equivalency. As the elected head of your organization, the board chair is best suited to communicate with the elected head of the government, the minister, member of Parliament or provincial legislature, the mayor or city councillor. The chief executive officer communicates with the deputy minister while program managers should link with government directors or managers.

Identifying Decision-Makers

You'll need to know who makes the decision, who can influence it, and what they can and cannot do for you. It's also helpful to identify



what would motivate them to help or not help you. You can find out who has a role in decision-making by:

- Calling or visiting the responsible office looking for information, asking people you know or who you think are in the know about who makes the decisions.
- Meeting with a senior officer or program manager or people inside government that you think would be supportive.
- Meeting with people who have the authority to make or recommend changes.

By understanding the timing and process for decision making, it will help you to determine the best time to intervene. Keep in mind the electoral, budgeting and legislative timeframes mentioned previously.

STEP 5 : DEVELOP YOUR STRATEGY

In developing your strategy and action think in terms of:

- WHO:** Who are you going to approach and who within your organization will take this on?
- WHEN:** What's the timing for these activities?
- HOW:** How will you achieve your goals; for example, through educating the public, persuading decision-makers, media advocacy?
- WHERE:** Will you meet government officials in their offices or yours?

Your strategy will need to meet your goals, and be adapted to the nature of your issue and the needs of the decision-makers.

An American study² provides useful insights about effective influencing strategies. When American lawmakers were asked to identify



²Rees, 1998.

those organizations that were the most influential, the study found that the most common way of gaining access to lawmakers was through:

- Serving as a source of credible, analytical and timely information.
- Conducting voter education.
- Employing people who had previously worked in politics.

The survey showed that many types of voluntary organizations could have substantial influence on public policy if they used their resources wisely.

Practices that were most effective included:

- Reaching out to all political parties.
- Maintaining an office to impact state policy and providing training to members on everything to do with public policy (e.g. law making to coalition building).
- Working in coalitions, especially with non-traditional partners (e.g. from outside the voluntary sector or with those that government might not expect to be supportive).
- Focusing resources on one or two top policy priorities.
- Convincing high profile organizations to take on your issue.
- Unifying grass roots action around themes that send a national message.
- Involving policy makers with others in a study commission that makes policy recommendations.
- Not trying to lead public opinion as much as tailoring the message to public attitudes.
- Using face to face contact, whether with policy makers, grassroots activists or media representatives as the communication vehicle of choice.

These research findings are outlined in more detail in *Appendix H*.



STEP 6 : CHOOSE YOUR TACTICS

Your tactics could include using the media to raise public awareness and concern, pursuing legal channels or influencing the political system.

In developing your strategy and the specific tactics, it's helpful to ask if it's best to use a low, medium or high profile approach. Here are some considerations:

Low Profile

For example, a private or low key approach could involve letter writing³, phone calls, face to face meetings with middle level public servants, sending written briefs, or inviting officials to special events.

This approach is best when you need to:

- Do fact finding. Find out about the priorities, concerns and interests of decision-makers and who has decision-making power.
- Explore options and partnership possibilities.
- Build new relationships, create a positive image, raise profile, build ongoing support and new allies.
- Offer solutions, explore options, partnership opportunities.

Medium Profile

This approach could involve meeting more senior level officials, appearing before a legislative committee, meeting with members of parliament, aligning with other groups, sending letters to politicians or the media.

Increasing your profile may be useful when you want to:

- Offer solutions
- Raise concerns, for example, point out the negative consequences of existing or planned actions



³See *Appendix I* for sample letters.

- Sway decision-makers' thinking
- Let other opinion leaders know where you stand.

High Profile

Activities that would be considered high profile include meeting with opposition members, publicly criticizing the government, releasing information that could be damaging to the government, launching an ad campaign, or undertaking some political action such as a rally or demonstration.

A high profile or more public approach can be riskier in that you can alienate those you are trying to influence or illicit criticism from unexpected sources.

However, you may wish to use this approach when you want to:

- Exert power by showing how you can rally others to your cause or make the government look bad.
- Raise public awareness and concern.
- Build wider spread support for your cause.
- Have exhausted all other avenues and there's urgency.

While there are no set prescriptions about how to advocate, a list of possible public policy tactics and the benefits of each are outlined in *Appendix J*. Keep in mind a few common sense principles: be brief, clear, accurate, persuasive, timely, persistent and grateful.⁴



⁴IEEE, 2002.

THE IMPORTANCE OF COMMUNICATION

Effective communication is at the crux of any approach but few charities are getting their message heard. Mr. Andre Picard, a Globe and Mail reporter and author of *A Call to Alms: The New Face of Charities in Canada* concluded in his 1996 study of the sector that:

“Canada’s \$90 billion a year voluntary sector is an invisible giant, an integral part of the lives of citizens but largely ignored by the media. Few leaders of charities and non-profits have the skills to communicate effectively. And, as a result, their work does not register on the journalistic radar screen, even though the voluntary sector is playing an increasing important role in shaping public policy and delivering services.”



Deciding whether to proceed

Below are possible factors to consider that may help or hinder you in achieving your goal:

- The magnitude and urgency of the problem.** The more people that are affected by the issue and the more people that will benefit from your proposal, the easier it is to get policy makers attention.
- The timing.** It's easier to proceed when your issue is of wide spread or increasing public concern; there is media interest; opportunities exist to speak out and be heard; for example, through public hearings or one-on-one meetings.
- Credibility and extent of your organization's track record and experience.** It's always easier and enhances your credibility to speak out on issues with which you have experience and knowledge and when you're seen as a valuable resource and leader in your field.
- Do-ability.** Your ability to achieve success. If the issue is so large and complex that it would require co-operation across different levels of government and sectors, and an extensive investment of resources, there is less possibility that decision-makers will want to tackle it. People are looking for areas where they can effect change and show results.
- Ability to work with others and number of allies.** If you're able to gain the involvement and support of others; if there's wide-spread concern and others have spoken out about this issue; it will be easier to have others reinforcing your position and supporting or joining your activities.



- Limited number of critics.** Identify those who might be opposed to your ideas and assess their ability to have influence. The more that's at stake, the more likely there will be those wanting to disagree or discredit your organization's suggestions for change. The fewer the opponents, the better.
- Potential to advocate effectively.** You're able to have effective spokespersons, and dedicate the needed time and resources.
- Limited risks.** If you have little to lose and there would be limited negative consequences whether your actions are successful or not.

The more items you checked off, the greater your chances of success.

ASSESSING THE RISK

While you have the potential to bring about positive changes, no action in the public policy arena is risk free. Be sure to answer questions such as:

- How contentious is this issue – is this a hot potato that's too hot to handle?
- Are you aware enough of relevant political developments?
- Will your position and actions be seen as biased and will this affect your organization's reputation and credibility?
- Are you clear on how far you'll go, how much time and effort you'll put in?
- Have you assessed the possible unintended consequences?



STEP 7 : IMPLEMENT YOUR PLAN - ASSIGN RESPONSIBILITY AND DETERMINE TIMEFRAME AND BUDGET

While your biggest cost will most likely be leadership time, you may also incur other costs related to preparing information pieces, brochures, or briefs; making phone calls; travelling to meet with leaders; consulting services (e.g. legal analysis, public relations advice, research, legislative monitoring) and holding special events.

The support of a paid monitoring service that can keep you abreast of governmental developments or a hired lobbyist on retainer, can help flag possible threats or opportunities and offer advice on influencing strategies.

Or you may wish to hire or assign a staff member so that you have internal expertise and support.



STEP 8 : EVALUATE REGULARLY, MODIFY AS REQUIRED, AND LEARN AS YOU GO

Once underway, you'll want to monitor your strategy as you go and modify it as needed. Ask yourself: how are we doing, are we making progress, are we getting to where we want to go.

Along with an ongoing or periodic evaluation to make sure you're staying on track, a final evaluation of your efforts will help you answer the question of did we achieve what we set out to do. This will help you draw useful information for future plans.

If you've got a clear goal and outcomes in mind, then it will be easier to evaluate whether you've achieved your desired outcomes. Be sure to distinguish between inputs (e.g. assigned a staff person), activities (e.g. held a meeting), output (e.g. got agreement to delay new policy and conduct further consultations) and an outcome (e.g. new policy improved conditions for young children).

The sample plan included in *Appendix K* can give you sense of how these pieces can fit together and be applied to a specific issue.





DO'S AND DON'TS OF H.I.P.P.

Here are some do's and don'ts to keep in mind as you embark on your influencing strategy.

Do's

- ✓ Recognize that you have power and rights. You have the power to help or hinder the government achieve its goals. You have the right to be heard and treated in a timely and professional manner by government representatives.
- ✓ Start at the bureaucratic level. Don't worry about going higher up within the bureaucracy, just let people know and give them a chance.
- ✓ Be well-prepared, map out key messages.
- ✓ Recognize the importance of media, marketing, and persuasive communications.
- ✓ Be patient and persistent. Keep in mind that your organization is in it for the long haul.
- ✓ Create and cultivate opinion leaders.
- ✓ Look for opportunities, listen to what's on the decision-makers' minds.



- ✓ Work with others, especially unexpected allies or people from other sectors.
- ✓ Remember it's all about people and relationships.
- ✓ It's easier to change things in government the earlier you intervene in the policy development process.
- ✓ Avoid win-lose situations.
- ✓ Tell stories, put a human face to your issue.
- ✓ Start low-key, you can raise your voice later if necessary.
- ✓ Be prepared to compromise.
- ✓ Check your facts.
- ✓ Work within the experience of your group members.
- ✓ Make sure you're knocking on the right door — the person or organization has the authority to do what you're asking.
- ✓ Politics is the art of the possible, offer solutions.
- ✓ Don't be swayed by titles. Those at lower levels in the bureaucracy can champion new approaches and help remove obstacles to change. Look for the social entrepreneurs in government to help you along.
- ✓ Stick to issues that correspond to your experience and expertise.
- ✓ Present yourself as constructive, professional, well-prepared, well connected, helpful, solutions oriented vs. whining or self-interested. You are a key player critical to the solution, not to be ignored or left out.
- ✓ Draw back or pull out if the timing is not appropriate or if you might damage your credibility.
- ✓ Be flexible, the public policy arena can be unpredictable.



- ✓ Recognize there are limited resources in government; the squeaky wheel does get heard; officials want to see an issue resolved and off their plate.
- ✓ Solidarity works. The more groups and sectors that are in agreement with you, the stronger your case.
- ✓ Third-party endorsements are helpful.
- ✓ Express your case in terms of government priorities.
- ✓ Put the consumer/voter first vs. your organization's own self-interest.
- ✓ Compromise on strategies and priorities but not principles.

DON'TS

- ✗ Invest a lot of time and energy in something that's not a priority for your organization.
- ✗ Think you've been heard and you'll get action because you had a meeting with the minister or mayor.
- ✗ Be surprised by unintended consequences.
- ✗ Weigh your agenda too heavily with self-interest as you'll be seen as a client of government rather than a potential partner.
- ✗ Burn your bridges along the way or do end runs with politicians or public servants. Decision-makers can change positions and you never know who you may need on your side.

"...government is our creature. We made it, we are ultimately responsible for it. The closer we are to government, the more we know about it, the more we can do to help meet these challenges."

(Forsey, 1980)



“Never doubt that a small group of thoughtful committed people can change the world. Indeed it is the only thing that ever has.”

Margaret Mead

FINAL THOUGHTS

A leadership survey among YMCA leaders found that often their most profound learning experiences were those when they were given a stretch assignment that involved significant responsibility in a new area and they were trusted to rise to the challenge. We can all learn by doing.

Democracy depends on citizens being involved and participating in public policy discussions. Too often people assume that decision-makers have all the relevant information and ideas when they don't. As an advocate, you can bring new ideas to public attention and advance new solutions to society's challenges.

YOUR ORGANIZATION'S VOICE IS CRITICAL AND NEEDS TO BE HEARD.



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*APPENDIX A***INCOME TAX ACT PROVISIONS**

The federal Income Tax Act states that registered charities may devote some of their resources to lobbying or political activities as long as they are non-partisan and remain “incidental and ancillary to the charity’s purpose”. Political activities are defined as efforts to influence the law, policy, or public opinion; for example, by speaking to a House of Commons committee, calling on a minister or senior public servant, organizing letter writing campaigns or demonstrations, and distributing hand-bills.

“A registered Charity can engage to a limited extent (e.g. devote no more than 10% of the charity’s resources) in non-partisan political activities which directly help accomplish the charity’s purposes.”¹ Substantially all (e.g. 90%) of the charity’s resources must be devoted to “activities in pursuit of its own charitable purposes”.

For example, a charity whose purpose is to respond to the needs of homeless people, support healthy child development, or offer immigrant settlement services might, in conjunction with its programming, research, and public education programs, ask people to press for new legislation.

While pressing for legislative change would be seen as political activity, it would be deemed as “ancillary and incidental” because it is directed toward the organization’s charitable purpose which is to meet the needs of those they serve. It would be viewed as subordinate to the other charitable programs of the organization. Therefore, it would be allowed so long as no more than 10% of the organization’s resources are spent on such activities.

A political activity is considered partisan if it involves direct or indirect support of, or opposition to, a political party or candidate for public office. A charity that is involved in partisan political activities can lose its registered status.

Check Canada Custom and Revenue Agency’s website for more details at www.ccr-aadrc.gc.ca

¹ Revenue Canada, 1995

APPENDIX B

GOVERNMENT ROLES : SELECTED SOCIAL POLICY ISSUES

Here are some examples of the different roles of each level of government in various social policy issues:

ISSUE	LOCAL	PROVINCIAL	FEDERAL
Health	Funds public health units. Provides disease prevention and health promotion services.	Funds Health Care System. Pays costs of doctors, hospitals and province-wide health campaigns.	Transfers funds to the provinces to cover costs of medicare. Funds Canadian Institutes for Health Research. Funds national population health strategies.
Children	Funds daycare, parks, recreational centres, libraries, parenting and after-school programs.	Responsible for child protection and welfare. Funds schools, welfare & healthy children development programs.	Transfers funds for child development programs. Negotiates transfer of funds for national child care program. Provides the Child Tax Benefit. Runs national child development, prenatal and Aboriginal Headstart Programs.
Immigration	Funds local services.	Funds settlement services.	Negotiates number of immigrants with the provinces. Funds language training & other services.

APPENDIX C

COMMUNICATING WITH THE MEDIA

At some point, your strategy may include increasing public awareness about your issue, your position, or the work of your organization. It's important to have developed effective media relations as the media has a broad reach, often with hundreds of thousands of viewers, listeners or readers. For the most part, the media has a high degree of credibility. Whether it's TV, radio, or print, you'll want to use these mediums to reinforce and support your strategy.

As it's the media's job to question and challenge, you'll want to be ready before you approach them. Your message should be cast in terms of how you've helped, why you're needed, why you matter, what you've accomplished and how you can make a difference. Have facts, statistics, analogies, anecdotes, and independent experts that can verify what you say.

(Source: Summit Consulting Group)

TIPS FOR HANDLING MEDIA INTERVIEWS

IMPACS, the Institute for Media, Policy and Civil Society, is a registered charity working to strengthen communication between not-for-profit organizations, government, and the media in Canada and internationally. Here's a summary of their tips for handling media interviews.

1. Answer the question and stop talking. Don't worry about filling dead air.
2. Be concrete, colourful, and anecdotal. It's easier to remember a story about real people doing real things.
3. Be yourself. You'll be unconvincing if you try to be something you're not. Find the right person for the message.
4. Breathe. It can help you calm down, slow your speech and make you appear thoughtful.
5. Develop your 9.2 second quote. That's the average amount of time you'll get in an interview to deliver your message. Practice and fine-tune it.
6. Don't make negative comparisons to others. Use your own knowledge and facts.

7. Don't repeat negatives. You want your audience to remember the positives, what you are versus, what you aren't.
8. You don't have to answer every question.
9. Listen carefully before you answer.
10. Don't use jargon and acronyms. You'll lose your listeners.
11. Don't use "no comment". Your listeners may interpret this as meaning you're guilty of something and the reporter may assume you're hiding something.
12. Passion is contagious and smiling is underused.
13. This is a business transaction, not a conversation. Stay focused and don't relax too much.

QUESTIONS TO CONSIDER

- Why is your issue so important when there are so many other issues and crises demanding attention?
- What public support do you have in your community?
- Why do you think that anyone beyond your community cares about this issue? If nothing changes, what impact will this situation have on the average citizen in your community?
- What specifically do you want people to do?

Refer to IMPACS free on-line resources, such as its publications on "Developing Effective Media Communication Skills", "Developing a Strategic Communication Plan" and "IMPACS Media Tool Kit" available to not for profit organizations at www.impacs.org.

APPENDIX D

PUBLIC POLICY SELF-ASSESSMENT TOOL

TELLING YOUR STORY

	YES	SORT OF	NO
1. Our organization has a strategic plan with clearly defined priorities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. We have a 'one pager' that describes our organization, its scope, impact, and contributions to the community.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Our organization has volunteers, board members, and staff who can give a compelling presentation about how our organization achieves its charitable mission.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. We have up-to-date data that gives a good picture of our organization (e.g. number of members, program participants, volunteer hours, financial data).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. We have evaluation data describing the impact of our programs and services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. We regularly provide training to volunteers, board members, and staff to ensure they understand and can articulate our charitable mission.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. The board chair, volunteers, staff, and/or I have received media training and feel comfortable dealing with the media.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Our organization has an inventory of political contacts among our volunteers or staff describing who knows people in positions of influence.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Our organization has an external relations/ public policy committee.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Our organization has developed a strategy for influencing government as a means of forwarding our mission.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total	_____	_____	_____

RELATIONSHIP BUILDING

	LOCAL			PROVINCIAL		
	YES	SORT OF	NO	YES	SORT OF	NO
1. I have met within the last year with key elected officials at the local and/or provincial level to make sure they are aware of the contributions of our organization and to hear about their plans and activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I have met with public servants at the local and/or provincial level to make sure they are aware of the contributions of our organization and to hear about their plans and activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. I have effective working relationships with local and/or provincial public servants, elected officials, and other community leaders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Our organization can easily partner with other local and/or provincial organizations, as needed, to achieve our goals.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. My board chair or I have met with key local and/or provincial media contacts to ensure they are well-informed about our organization.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. We have given tours of our organization to our key stakeholders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
7. Board members, staff and/or I have participated over the last two years in local and/or provincial public forums, committees, or task forces to discuss issues linked to our mission.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. We have involved some of our key stakeholders in our organization's activities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
9. Board members and/or I have successfully influenced our local and/or provincial government.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. We know whom we can draw upon for advice and support in positioning our organization on public policy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

Total _____
 Total of all pages: "Yes" _____ /out of 47

Score:

- 1 – 20** May need to review 'Why H.I.P.P.' again.
- 21 – 39** You're on the right track.
- 40 – 47** You're on the fast track and your organization is well positioned to influence your local and provincial governments.

APPENDIX E

SKILLS TO INFLUENCE PUBLIC POLICY

As you begin to assign volunteers and staff to leadership roles in public policy, assess their ability to demonstrate the following skills or their potential to develop them. Some skills may be more readily purchased, budget permitting. There are various not-for-profit and private companies that can offer expertise in government monitoring, analysis, and strategic advice or communications.

KEY SKILLS

- ✓ Political savvy (practical know how).
- ✓ Awareness and understanding of public policy issues.
- ✓ Ability to track and analyse public policy issues to identify threats and opportunities to influence.
- ✓ Ability to tell a compelling story.
- ✓ Highly committed to the mission of your organization and its values.
- ✓ Ability to develop and lead political strategies.

OTHER SKILLS (THESE CAN BE PURCHASED)

- ✓ Communication skills including the ability to prepare succinct and appealing written materials about your organization, its impact, and what you offer.
- ✓ Ability to turn information into knowledge.
- ✓ Understanding of the political process; for example, how decisions are made, who makes decisions, the role of other stakeholders.
- ✓ Ability to develop and use political connections.

APPENDIX F

THE LENS OF A POLITICIAN

It's helpful to look at your issue from the perspective of the local, provincial, or federally elected official you may be trying to influence. Here are the types of questions that are likely to be going through the politician's mind. Be sure to develop responses ahead of time so you'll be ready to address any issues that might arise.

UNDERSTANDING THE ISSUE

- How and why has this issue arisen?
- What are the dimensions — for example, how big, who's affected, does it link with our government or the opposition's agenda?

THE VIEWS OF OTHERS

- Who has been consulted; what process was used and what were their views?
- What are my constituents saying about this issue?
- What are the views of the media, community and business leaders, and local interest groups?
- Are my significant campaign supporters taking public positions on the issue; if so, what is their position?

PROS AND CONS

- What's the impact on jobs, the economy, quality of life, gender, diversity, official language groups, federal/provincial/municipal relations?

ADVICE

- What is the advice coming from my staff and from public servants?

POLITICAL VIEWS

- Is this approach consistent with other actions I've taken or things that I've said?
- Is it consistent with my party, my political and economic philosophies and priorities?
- How will this effect my re-election prospects; will it be viewed as positive or negative; help/hinder my re-election?

REPERCUSSIONS

- What are the repercussions (e.g. costs, critics, benefits) if this action is taken or not?

*APPENDIX G***TELLING YOUR STORY**

Here's an example of how to describe the mandate and scope of an organization.

THE YMCA IN CANADA - BUILDING STRONG KIDS, STRONG FAMILIES AND STRONG COMMUNITIES

For over 150 years, the YMCA in Canada has been making a difference in the lives of people and communities across Canada. Each year, over 1.5 million Canadians participate in the various programs offered by the 61 YMCA and YMCA-YWCA associations. Each of these organizations is an autonomous values-based charity open to people from all walks of life, regardless of race, religion, income or ability. Together YMCAs and YMCAs-YWCAs are found in 250 cities and towns in every province in Canada. They offer a wide range of programs and services, for example, health, fitness, recreation and sports, child care, youth leadership development, employment, newcomer services and community development. YMCAs and YMCA-YWCAs across Canada are creating new infrastructure, mobilizing community resources, increasing volunteerism, addressing social problems, supporting individuals and families. Strengthening quality of life for Canadians is at the heart of the YMCA and YMCA-YWCA.

The YMCA in Canada is dedicated to the growth of persons in spirit, mind and body and in a sense of responsibility to each other and the global community.

APPENDIX H

PROVEN STRATEGIES FOR EFFECTIVE ADVOCACY

American researcher Susan Rees in her 1999 study 'Effective Nonprofit Advocacy'², found that those non-profit organizations that are successful in influencing national public policy share common strategies regardless of their size or philosophies. Based on feedback from policy makers about who were the most influential, she found that effective advocates developed messages deliberately, used savvy lobbying techniques, and facilitated effective advocacy by building organizational capacity.

Key strategies include press conferences, op-ed pieces and guest articles, phone calls and letters, to elected officials. They also planned local events such as site visits and ceremonies.

Their key strategies included:

DEVELOPING A PLAN

- Developed a well-defined advocacy plan.
- Focused on one or two policy issues.

RECRUITED STAFF AND BOARD MEMBERS CAREFULLY

- Hired people and staff who had solid relationships with policy makers at different levels of government.
- Enlisted known community leaders to contact policy makers.

CHANNELED RELIABLE INFORMATION

- Cultivated a reputation as a useful and credible source of information.
- Got information to target audience while the issue was hot.
- Developed relationships with reporters; e.g. faxed news releases to them.
- Maintained a well-designed web site with links that allowed visitors to send messages to policy makers and included data to develop messages.
- Conducted public opinion surveys of their constituents and informed policy makers of the results; used official data to make their case.

²Rees, Susan. *Effective Nonprofit Advocacy*. Nonprofit Sector Research Fund, 1998.

*APPENDIX I***SAMPLE LETTERS TO POLITICIANS****TIPS**

- Keep it short, 1 to 1-1/2 pages.
- Avoid lengthy attachments; use a one-page summary in bullet form that elaborates on your issue.
- Always state the purpose of your letter in the first line.
- The second paragraph should tell them what you want them to do and briefly describe who you are (your credentials or expertise).
- The third paragraph should detail rationale, relevant facts and supporting materials, examples, how others support your views, implications/impact/consequences.

SAMPLE LETTER - MEETING REQUEST WITH A MINISTER

Dear (*relevant minister*):

I am writing to let you know of (*name of organization*) concern/offer feedback/recommendations about your department's proposed (*name of initiative*) and to request a brief meeting with you to offer our suggestions.

The board members of (*name of organization*) wanted to make sure that you are aware of the impact of these proposals on our work with children and families. For example (*then describe anticipated impact adding facts, figures, stories*). We have attached some of our ideas (*a proposal*) about ways to address this issue that could have fewer negative repercussions. We would like to meet with you to discuss this issue further and will be calling your office to arrange a meeting. Thank you for your consideration.

SAMPLE LETTER - RECOGNITION OF POLITICIAN'S EFFORTS

Congratulations on the media coverage you recently received on your ideas for resolving (*issue*). As an organization committed to (*state your mission*), we support your position and are pleased to see this critical issue receive increased attention by the media.

You may not be aware that our association serves a number of children by providing (*name services*) which has resulted in (*describe impact*). We believe that more needs to be done to improve (*describe desired changes*).

We invite you to visit one of our local offices/branches so you can see first-hand how we

are bettering the lives of *(clients)* and hear more about our ideas for change. Please don't hesitate to contact us at *(phone/address)*.

Know that many in the community support your views and your change efforts.

SAMPLE LETTER - INVITATION TO A FORUM

As an organization committed to *(state your mission)*, we are concerned about the *(issue)* affecting youth in our community. To help us better define how we might better serve the needs of youth and their families, we are hosting an expert forum to raise public awareness and to generate ideas about what can be done by *(name of organization)*. We are inviting representatives from universities, community colleges, and the media.

Your participation will give us valuable feedback on the role we can play.

I am writing to invite you to a breakfast for policy makers *(date, time, location)*. Given your commitment to *(issue)* we thought your participation would add an important perspective to our discussion.

SAMPLE LETTER - INVITATION TO GIVE CONGRATULATORY REMARKS

On *(date and time)*, our organization is hosting a special community event to *(state purpose)*. We hope that you will be able to join us and offer a few congratulatory remarks. We have also invited *(names of prominent community representatives)*. We expect a number of others from the community to attend as well as the media.

We are using this event to not only celebrate this *(new initiative)* which will provide opportunities for *(impact of initiative)* but to raise public awareness about the needs of youth. *(Name of research agency)* will be sharing some research that shows the unique needs of *(issue)*. As you are a strong supporter of the need to increase youth services, we thought this would be a good opportunity for you to lend your support to this important issue.

I will be calling your office to follow-up on this invitation. We look forward to your participation as well as that of any of your colleagues or other community leaders whom you might suggest.

Thank you for your consideration.

APPENDIX J

PUBLIC POLICY TACTICS

Described below are various approaches to engaging in public policy, and tips on when to use each approach.

COMMUNICATION

PHONE CALLS

- When relaying a simple message.
- As a follow-up to letters, concerns, invitations.
- Alert to upcoming actions.
- To try and secure a meeting date.
- To relay the importance of an issue.
- To get information (e.g. identifying who's the best person to deal with).

LETTERS

- Use to formalize invitations; advise of your interest in meeting; raise a concern; give recognition or show appreciation; pass on congratulations or thanks.

E-MAILS

- Can reach several people at once with the same message, making it easier to reply if your message is not complicated.
- Useful as a quick reply to those comfortable with this technology.

STRATEGIC MAILINGS: QUARTERLY UPDATES/NEWSLETTERS

- Raises awareness, ensuring others know about your ongoing contributions to the community.
- Keeps your organization on the radar screen.
- Creates a positive impression.
- Don't create information overload by sending irrelevant information that appears unprofessional.

INVITATIONS TO A SPECIAL EVENT

- Opportunity to show what you do, others can see what success looks like and better understand what is required to succeed.
- Allows politicians to hear first-hand from the front-line and those affected by your issue.
- Include politicians in fundraising efforts, educate them on how your work links to their constituents.

SHARING RESEARCH FINDINGS

- Adds legitimacy to your issue.
- Gets your issue on the government's radar screen.
- Reinforces other messages by demonstrating evidence, especially if it adds to existing evidence.

LOCAL NEWSPAPERS

- Write an op-ed piece, an opinion piece that appears opposite the editorial page, to raise public awareness and understanding about your issue.
- Send a letter to the editor to correct any information that is wrong or to show your organization's support or position for an issue raised in the newspaper.

EVENTS**ORGANIZING A TOUR OR VISIT**

- Raises awareness and understanding, builds relationships.
- Invite politicians for breakfast or lunch or to see a part of your organization they would not normally see.
- Allows people to see first-hand the impact of your work, especially if personal testimonials are included.

HOSTING A COMMUNITY FORUM

- Positions yourself as a leader, builds momentum.
- Draws in others and gains their commitment and support.
- Raises community awareness and concern.
- Provides a venue for those affected to speak to decision-makers.

ATTENDING PUBLIC PRESENTATIONS, HEARINGS OR CONSULTATIONS

- Opportunity to provide technical information and advice and share knowledge or research.
- Good for raising awareness, increasing support.

MOBILIZING CITIZENS/RALLIES/DEMONSTRATIONS

- Good for generating media attention, showing strength if other tactics are not getting desired attention.

FACE-TO-FACE CONTACT

MEETING PUBLIC SERVANTS

- Gain information about what's happening.
- Helps to better understand constraints, concerns, possible competing interests.
- Explore possibilities; raise profile; build relationships.

BRINGING PROGRAM PARTICIPANTS TO MEET POLITICIANS

- Helps politicians put a human face to the situation and to see first-hand the realities.
- Helps build greater commitment to addressing your issue.

MEETING WITH POLITICIANS

- Provides a forum to make your views heard and to raise any concerns.
- Enables you to find out more about the government's perspective on an issue; to hear first-hand their concerns, priorities, and interests.
- To look for common issues and win-win opportunities; can explore opportunities for partnership.
- Good opportunity to make your case and position your organization in their minds.
- Recognize that meetings rarely lead to tangible commitments.

MEETING WITH POLITICAL AIDES

- Can help increase attention to the issue.
- Can assist with securing a meeting with key people.
- Can help build internal supporters or champions.
- Get advice on how to proceed, other contacts and possible strategies.
- Gain a political perspective for an issue raised in the newspaper.

MEETING WITH LEADERS IN OTHER SECTORS

- To gather support and build allies by building cross-sectoral support for your issue.
- To raise awareness and increase understanding.
- To line up representatives from sectors that normally would not be involved, to speak out, showing how widespread and mainstream is the support.

APPENDIX K

SAMPLE PUBLIC POLICY ACTION PLAN

Here's a model of an action plan for influencing provincial public policy related to children.

PUBLIC POLICY ISSUE

Health, social, and economic consequences of the increasing number of inactive children.

GOAL

To influence provincial public policy affecting children in order to:

- Promote government policy and program initiatives that increase resources and priority given to this issue.
- Contribute to our mission of building strong kids, strong families, and strong communities.
- Promote a favourable environment for our programming.
- Where feasible, result in expansion of our programming.

OUTCOMES SOUGHT

- To be better informed of key developments and threats related to this issue.
- Increase the number of key elected and non-elected officials who are knowledgeable about this issue and its implications, and who are committed to action.
- Increase key decision-makers awareness about our organization's activities related to children, especially our work in increasing the involvement of low-income children in physical activity.
- Create a more favourable environment, through public education, policies and programs, that leads to an expansion of our involvement in addressing this issue in the short term, and social change in the long term.

PROPOSED POSITION

We are concerned about the increasing number of Canadians, especially children, who are inactive and the consequences of this inactivity for their physical, mental, and social development and the potential for long-term health consequences.

We believe all children should have access to educational, recreational, and sports opportunities that promote their optimal physical development in a manner that integrates the spirit, mind, and body.

We believe schools, governments, families, and communities all have a role to play in creating the needed conditions and opportunities for removing barriers.

We are committed to contributing towards this goal and collaborating with others to achieve it.

PROPOSED STRATEGY

Key elements will include:

- Monitoring the provincial scene to keep apprised of any threats and opportunities.
- Educating key decision-makers about our organization's activities through face-to-face meetings, strategic mailings, and invitations to hear testimonies from program participants.
- Communicating our concerns and ideas at strategic venues.
- Aligning with other organizations and networks sharing common values, concerns and interests.

PROPOSED ACTIVITIES

Undertake Internal Readiness Activities

- Confirm board support for position and action plan for public policy involvement. Identify committee or other champions and communicate within our organization to staff and volunteers.
- Prepare fact sheets, position statements, proposals and stories. These will be short documents with facts and arguments, information on what our organization is doing and could do, and our proposals on the actions needed by government.
- Line up resources, develop the timeframe, and identify staff and volunteers responsible for implementation.
- Provide communications training for spokespersons.

Monitor Government Activities

- Purchase monthly public policy newsletter that summarizes key developments on the provincial scene.
- Scan leading newspapers for relevant articles.
- Review recent announcements, business plans, and organizational charts of the ministries of health, sport, recreation, education and social services.

Educate Key Decision-Makers

- Identify the key decision-makers; for example, the manager and director within the public service, political aides, committee chairs and organize meetings.
- Build inventory of key contacts within our organization.

Communicate at Strategic Venues

- Secure invitation to participate in federal-provincial regional consultation on healthy living.
- Have regional members attend local consultation on these issues. Arrange for them to undertake activities that reinforce provincial strategy; for example, telling our story with key municipal public servants, politicians and the news media.
- Create media strategy including opportunity for a news story about our latest initiatives that are increasing participation of low-income kids in recreational activities. Include any research findings that reinforce the broader societal benefits of active children.

Align with Others

- Join or become more active in provincial network for active living.
- Explore partnership opportunities with like-minded organizations. To bring more resources and credibility to our issue, look at linking with a group that has something we lack (e.g. research expertise) or that is from another sector that shares our concern (e.g. financial institutions concerned about child development).

TIMEFRAME

Include dates for specific activities.

BUDGET

Include costs (e.g. for travel, production of materials).

LEADERSHIP

Identify roles and responsibilities.

EVALUATION

Include evaluation plan.

APPENDIX L

COLLABORATION AND PARTNERSHIP TIPS

When working with others, it may be helpful to differentiate between co-operation, co-ordination or collaboration.

When you are co-operating with others, usually your goal is short-term. You're interested in keeping resources separate and managing your own planning. In co-ordination, your relationship with another organization may be more formal; you may have an informal agreement to plan together and share resources as needed, for example.

When you collaborate or partner with another organization, it's best to consider putting a formal structure in place. Both partners should agree on clearly defined roles and responsibilities, how resources will be pooled, and how outcomes for the partnership will be established and evaluated.

CHARACTERISTICS OF EFFECTIVE PARTNERSHIPS

PARTNERS

- Share the same philosophy, vision, cause.
- Work jointly towards achieving the same objectives, goals, outcomes.
- Understand and respect each other's differing expectations, roles, responsibilities, contributions, and power.
- Agree to a process for working together.
- Regularly evaluate the partnership.

TIPS FOR EFFECTIVE COLLABORATION

- Take the time to build trust.
- Seek consensus.
- Communicate openly and frequently.
- Agree upon roles and responsibilities.
- Stay attuned to group dynamics.
- Share the credit for success.

We build strong kids,
strong families,
strong communities.



Plus de vie à la vie
des jeunes, des familles
et de la communauté.

YMCA