

DEVELOP A STRATEGY

Use the Strategy Chart as a Map

The process of building the campaign strategy incorporates the early steps of documenting the public health problems and the political environment and selecting the issue focus. Beginning with the issue focus, the core group determines the campaign goals, organizational resources and needs, allies and opponents, targets and tactics. Taken together, these are the campaign strategy. Though the term “strategy” is often used to describe a series of tactics, as in “media strategy” or “electoral strategy,” we are using it differently here. In this case, strategy means the overall design for building the power to compel a government official, who otherwise would not, to support local policies regulating tobacco marketing and sales when he or she does not otherwise want to.

Preparing the strategy chart is the job of the core group.

The strategy chart is your map. It details the overall design for building power. It is aimed at getting something from somebody who does not want to give it. It is not an approach that works for educational campaigns or electoral campaigns, but for campaigns aimed at pushing a reluctant officeholder to support your issue goals.

Preparing the strategy chart is a very important task of the leadership group and may require several intensive sessions involving not only the core group but also others with information critical to the strategy formulation process. Someone needs to be at the strategy meetings who knows how the city council (or board of supervisors) works inside and out, and who knows the major institutions in the community and how the local economy works. If no one like this is in the core group, find and invite a person with these skills to participate in this process.

Midwest Academy Strategy Chart				
Goals	Organizational Considerations	Constituents, Allies and Opponents	Targets	Tactics

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The strategy chart, starting with the “goals” column and ending with the “tactics” column, is a system in which changes or additions in one column require changes or additions in another. It is an exceptionally useful tool for linking dozens of elements in complex campaigns and can adapt to changing circumstances.

To illustrate how to build and use the strategy chart, we will use an example of a campaign to win a licensure ordinance in a medium-sized California city. Call it the Stop Illegal Tobacco Sales Campaign. We are selecting a policy campaign as the example, however, all of the steps we are recommending apply to enforcement campaigns as well, in which the desired policy already exists, but is not being enforced.

The group leadership in this example is composed of the most active members of the local tobacco prevention coalition, including the voluntary health organizations, a Latino health clinic, a neighborhood association and the county’s local lead agency staff. The group has a history of success in promoting new tobacco control ordinances, and has recently gone through a “goal selection exercise” and determined that the issue it wants to work on is passing a city wide licensure ordinance. At its first strategy session, the core group works on the question of goals.

Long-range, Intermediate and Short-term Goals

Long range goals are ones you eventually hope to win and can be visionary in scope. Intermediate goals are steps toward reaching a long-range vision. They can be new policies or stronger enforcement; there can be several of them, beginning with the current campaign. Short-term goals are those that must be achieved before the current campaign can achieve its policy or enforcement goals.

The Stop Illegal Tobacco Sales core group selects eliminating youth access to tobacco as its long-range goal and passing a citywide licensure ordinance as the intermediate goal. But it has another intermediate goal as well: an enforcement campaign following passage of the licensing ordinance.

Remember that intermediate goals are the ones the current campaign hopes to achieve. Make them specific. You must be able to describe how you know when you have won and how achieving the goal meets the three major criteria for choosing an issue: (1) winning real improvements in public health; (2) giving people a sense of their own power; and (3) altering the relations of power in the community.

The intermediate goal in the Stop Illegal Tobacco Sales Campaign is to pass a citywide licensure ordinance. The group needs to answer the following questions about the intermediate goal:

- Is it specific?
- Will you know when you have won?

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- Will victory mean real improvement in public health?
 - Will it give people a sense of their own power?
 - Will it alter power relations in the community?

Short-term goals are more than the tasks of the campaign; they also include major challenges that must be met to achieve victory. The campaign has to achieve these goals to build the power needed to win.

The Stop Illegal Tobacco Sales core group identified two short-term goals for the licensure campaign: support or neutrality from the chief of police and 25 endorsements from community organizations. Support from the chief of police was important for two intermediate goals: passage of the policy and enforcement.

On the strategy chart, the goals are listed under each category and arranged in the order in which they have to be achieved. For instance:

Column 1: Goals

Stop Illegal Tobacco Sales Campaign

1. Long-range goals
 - Reduce youth access to tobacco
2. Intermediate issue goals
 - Pass a licensure ordinance
 - Ensure aggressive enforcement of licensure ordinance
3. Short-term goals
 - Secure support or neutrality from chief of police
 - Line up endorsements from 25 community organizations

Organizational Considerations

Filling in this column requires a brutal self-assessment of what you have to work with to win your goals. Begin with the resources available that will go directly into the campaign; including:

- Staff (be honest about how much time is really available)
- Leaders
- Members
- Volunteers
- Office and meeting space
- Supplies
- Copying
- Postage

Do not forget donated services like research, and include less tangible assets like good relations with specific news reporters, a well-known and respected chair of the campaign and the strong reputation of coalition members. Whenever possible, assign a dollar value to the listed resources.

Next, identify needed resources. Without the necessary resources, the goals remain out of reach, even with a great strategy. In many campaigns, the missing resource is staff time. Attempting to mount a complex campaign with a couple of donated staff giving five hours a week is a mistake. It is much better to develop a fundraising plan to raise the money to hire an organizer. The organizer can coordinate everybody's efforts and be the consistent planner and pusher to make things happen. It is worth the fundraising effort. In addition to staff, the core group may need to develop spokespersons in different council districts and recruit a political consultant or lobbyist with governmental expertise. The follow exercise presents an organized process for identifying needed resources for the campaign.

EXERCISE: What Are Your Group's Resources? *

While preparing the strategy chart, the group can conduct this exercise to identify the four elements in the "organizational considerations" column:

- Resources available for the campaign
- Resources still needed for a successful campaign
- Coalition or organization desires for the campaign (strictly for your internal organizational development)
- Internal problems in the coalition or organization which need to be addressed for success

Supplies needed: butcher paper, easel and pad of paper or chalkboard; dry-erase pens, markers or chalk; tape; sticky notes.

Step 1: Discuss the intermediate and short-term goals of the campaign. Make sure everyone is on the same page.

Step 2: Brainstorm the type of resources that are needed to accomplish your goals; for example, a good relationship with the chief of police, a full-time staff person for six months and more community-based support in District 5.

Step 3: Write each resource needed on a different piece of paper or section of chalkboard/dry erase board.

* Based on an exercise in *A Guide for Local Action*, American Lung Association of California, Educating Key Opinion Leaders Project, October 2001, p. 11.

Step 4: Give everyone some sticky notes; ask them to think of re-sources they can contribute. Ask them to write each resource they can bring on separate sticky notes (e.g., if someone is a neighbor of the chief of police). Ask everyone to place their sticky notes (with their names on them) under the appropriate resource.

Step 5: Compare the resources needed with those offered on the sticky notes and determine which resources are missing. Make a list. Figure out what/who can fill those holes.

Step 6: Decide which internal organizational objectives you hope to achieve in the course of the campaign. Begin by brainstorming. These are not the campaign goals, but things to strengthen the organization to accomplish its tasks and be better prepared for the next campaign. For example, organizational objectives might be: identify two new leaders in the business community to support your mission, or, bring the churches in a particular neighborhood into the coalition. List the suggested objectives and rank them in order of importance.

Step 7: Brainstorm and list the internal problems that may develop within the coalition that could hamper the campaign; through group discussion try to arrive at solutions.

The Stop Illegal Tobacco Sales Campaign core group completed the “Resources” exercise. Available resources were:

- Janet’s time as lead organizer (4 hours per week)
- Robert’s time as an organizer (5 hours per week)
- Derek’s time as support staff (5 hours per week)

A coalition organization contributed:

- Office space
- Use of a copy machine
- Two computers
- \$100/month in postage

Another organization offered their marketing staff person to produce press materials and organize press events, and both the health clinic and the neighborhood association said they could turn out parents and children in their neighborhood for a couple of events. The department of health staff person said she could bring a retired member of city council to the next meeting to discuss how the council works.

Only a few serious resources were missing. The group needed at least a half time organizer for six months at a cost of \$7,500 and another \$2,500 to cover phone, travel, meeting and printing expenses for the campaign. It also needed a well-regarded coalition chair to make

this campaign a top priority for the next six months. The group decided to develop a financial plan requesting \$500 to \$1,500 from the organizational members of the coalition and to conduct a mailing to individual members for support. The money would be used to hire Mary. She was already working part time for one of the leadership organizations and everyone knew she was a good organizer. It was agreed that the executive directors of two voluntary health organizations would meet with the coalition chair, since they knew him best, to urge his undivided attention to this campaign.

Other organizational objectives of the Stop Illegal Tobacco Sales Campaign included adding three active member organizations to the coalition over the course of the campaign and, finally, creating an advisory board of community and business leaders. The only internal problem was that some members thought that the organization offering the media help would hog all the coverage and not promote the other members of the coalition. It was agreed to talk with the media staff person and make her aware of the coalition's concerns and desires; they need the press to see there is broad support by community organizations.

Column 2: Organizational Considerations

Stop Illegal Tobacco Sales Campaign

1. Resources to put in
 - Janet's time as lead organizer (4hrs/week – \$1,500)
 - Robert's time as organizer (5 hrs/week – \$1,563)
 - Derek's time as staff support (5 hrs/week – \$1,250)
 - Youth Action Network: office space, copier and 2 computers, \$100/month postage (\$2,700)
 - The Healthcare Alliance: media/marketing staffer for campaign media responsibilities (\$875)
 - LLA: retired councilman with governmental expertise
2. Resources needed
 - Hire Mary as a half-time organizer (six months – \$7,500); travel, printing, meetings, other expenses (\$2,500)
 - Undivided attention of coalition chair
3. Internal organizational objectives
 - Add three organizations to core group: local Police Activities League; the local Boys and Girls Club; and, the Mid-town Church's Youth Program.
 - Create community advisory board including representatives of business, professional, educational and religious communities.

4. Internal problems

- Concern that the Healthcare Alliance would dominate the press coverage. Discuss concerns with donated staff person; convey coalition's concern that press message reflect breadth of campaign.

Constituents, Allies and Opponents

The Constituents, Allies and Opponents column in the strategy chart answers the questions:

1. Who cares about this issue?
2. What power do they have with the targeted officials?
3. How are they organized?

It divides supporting organizations and individuals into “constituents” and “allies.” Constituents are those who will actively participate in the campaign, maybe even join the coalition in the process. Allies are those you can approach to endorse the campaign, but are unlikely to contribute resources beyond their endorsement.

Begin this section of the strategy chart with open arms. Consider broad categories of potential friends: family oriented groups, sports leagues, medical professionals, healthcare providers, religious organizations, civic groups, youth clubs, neighborhood associations, and educational organizations. Think of each of these broad categories as the hub of a wheel and then look at the spokes. Under the category of religious organizations, seek out youth groups within churches and synagogues. Under youth clubs, consider the local Boys and Girls Club, Campfire Girls, Boy Scouts and high school student clubs.

With just a little effort, you can identify dozens of potential supporters. Tobacco prevention activists often underestimate the breadth of support in the community and stick with traditional friends and allies. Sometimes it is because you are just too busy to spend the time recruiting new people and sometimes you are not aware of the strong consensus among the general public about your issue. Either way, start broadly and move the campaign beyond your traditional allies and encourage new people to participate.

Be aware of any problems a prospective ally may bring to the coalition. Check their past history and general reputation. Following are several questions that should be answered as each potential supporter is identified:

- Why do they care about this issue? What do they stand to win or lose in this campaign? How are they organized? How do you reach them?

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- What power and how many members do they have?
 - What is their relationship to the target?
 - Did they work for or against the officeholder in the last campaign?
 - Do they make political campaign contributions?
 - Will they give money to issue campaigns?
 - Do they bring special skills (lawyers), special credibility (clergy), or special appeal (children)?

Opponents are those individuals and organizations who stand to lose something if you win. How much they will lose is a good measure of how much they will spend against the campaign and the intensity of their opposition. Ask the same questions about opponents as about allies, and compare the strength of the campaign's allies with that of the opposition. It is an important comparison because your issue campaign has the same target as the opposition effort. You both have the same objective: to get the targeted officeholder to support your respective positions.

You are concerned with identifying your opponents so that you can counteract their strengths and exploit their weaknesses as you build power against the targeted officeholder. Your power equals your strength plus your opponent's weakness. Be clear: Your opponent is not the target. During the campaign, remain focused on the target and do not directly challenge the opponents. You gain very little if anything from debating representatives of the local retailers association on a licensing issue. You will not win over large numbers of retailers, and it distracts the campaign from its focus on the target. An exception would be an engagement with representatives of the tobacco industry in which you are able to associate the target in some way with Big Tobacco.

The leaders of the Stop Illegal Tobacco Sales Campaign quickly identified a long list of potential constituents and allies. They found a list of all the members of the county's Prop 10 commission and a list of all the grant recipients. They checked past children and family related commission rosters for the city and the county and the recipient list for United Way grants. They got a listing of all the churches, synagogues and mosques from the Sunday paper. The City's Community Development Department provided a list of neighborhood and civic organizations. The school district office had information about all of the local parent teacher associations, public and private after school programs, student clubs, and local representatives of the school nurses association. The Chamber of Commerce had listings of all of the hospitals, physicians by specialty, and clinics in town.

Through these and other resources, the leaders of the Stop Illegal Tobacco Sales Campaign put together a very large list of potential supporters, and then faced the task of narrowing it down to who they wanted to approach. It took time and a lot of phone calls to determine which churches had youth programs, to sift through the children's organizations and grant recipients, and to select physicians to approach. But they did it, and the list was impressive. Later, after the group identified the targets, they identified additional people, acquaintances, colleagues and friends who had specific connections to the targets. Those names were added to this column.

The opposition list was much shorter, but the opponents had political clout, including the Chamber of Commerce, several prominent store-owners, an ethnic business association and the local newspaper.

Use the following questions to determine the opponent's power.

- What will these opponents lose when the campaign succeeds?
- Will they lose money? If so, how much?
- Will their taxes go up?
- Will they lose standing in the community or is their opposition more a theoretical or abstract opposition to an idea?

Several opponents in the Stop Illegal Tobacco Sales Campaign would not suffer material losses from passage of the licensing ordinance. Their opposition seemed to be motivated by concern over excess business regulation and taxation, and the fact that a couple of local businesses were calling too much attention to the issue. On their own, it is not certain that the Chamber, the Ledger Press Newspaper and the Asian Business Association would lead a fight to defeat it. The two retail stores, on the other hand, would have to pay some fees and risk losing their license to sell tobacco if they are caught selling to minors. They have some tangible exposure. But if they obey the law, it is not a big deal for them.

In this circumstance, it is possible (not by any means certain) that the opposition will not mobilize fully unless they are blatantly challenged by the coalition campaign. Investigate that possibility. If it turns out that keeping a low profile for part of the campaign will keep the opposition quiet, make a note in the opponent's column about the appropriate timing of the campaign's tactics.

Column 3: Constituents, Allies and Opponents

Stop Illegal Tobacco Sales Campaign

1. Constituents and Allies

Parent Teacher Associations

- McKinley Elementary School
- Adams Middle School
- Southeast High School

Religious Organizations

- Midtown Presbyterian
- Beth Israel Synagogue

Children and Family Organizations

- Campfire Girls
- Girls Inc.
- Boys and Girls Club
- At Home Services
- Boy Scouts

Neighborhood and Civic Organizations

- Belmont Neighborhood Association
- Community Pride, Inc.
- Women in Business
- Council of Civic Associations
- Police Activities League

Medical and Healthcare

- St. Joseph's Medical Center
- Local representative of American Association of Family Physicians
- Dr. Rudolph Smith, Pediatrician

Educational

- Middle and high school track, soccer and football coaches
- Program coordinator from middle/high school after school programs
- Two high school student clubs
- Popular high school ethics and religion teacher

2. Opponents

- Chamber of Commerce
- Asian Business Association
- Community Groceries, Inc.
- Frank's Drugstore
- The Ledger Press

Decision Makers

Selecting the target of the campaign may seem simple, and sometimes it is. But local elected officials may work hard to confuse citizen's groups about who has the power to give them what they want. Often they try to deflect responsibility to city staff (e.g., the city manager, county executive officer, health department director or chief of police). These officials rarely have the power to give you what you want, and are being used as "flak catchers" by the elected officials.

Identify which person or persons can make the final decision to give you what you want. That is your target. Personalize the target even when it is a group, like the city council, that makes the final decision. Find the one or two council members who will make the difference. Changing the minds of a few individuals feels more manageable than taking on an entire institution and allows you to develop tactics to play on very human and individual responses like fear, guilt, fairness, vanity, loyalty and ambition.

There is a close relationship among the constituents and allies column and the targets column. Do you have the allies you need to reach the target council members? If you get the Superintendent of Schools to support you, can he reach his close friend, the councilman? The back and forth between these two columns is the heart of the campaign strategy. When there simply are no allies that have sufficient weight with the target, you should consider secondary targets (e.g., people who you can reach more effectively than the primary target, and who have a power relationship with the primary target).

A secondary target is not someone who can give you what you want; it is someone who can influence your primary target to get it. For example, the health department director is not a secondary target to the targeted county Supervisor. Yes, the director could authorize an increase in the "stings" conducted on local merchants, but he cannot pressure his boss effectively to support a licensure policy. A department or agency head is rarely in a power relationship with the Supervisor. The health director definitely has access to the Supervisor, but access does not equal power.

To exert power in a relationship with a local officeholder means to have something the officeholder wants but cannot get. The health director has nothing the Supervisor wants, but when up for election, the Supervisor wants support from the environmental community. The head of the Mountains Preservation League (MPL) is the key to that support and one of the lead organizations in the issue campaign works closely with the League. In that circumstance, MPL becomes a secondary target because it is in a power relationship with the supervisor and your coalition has more influence with MPL than it does with the supervisor.

The Stop Illegal Tobacco Sales Campaign, our continuing example of a hypothetical licensure campaign, began the process of selecting the targets for the campaign by filling out the [Decision Maker Matrix](#) (see

example below). They began by listing all the council members. Based on what they found out about each council member’s position on licensure, they determined their targets.

Decision Maker Matrix

Name/Title	Target	Supporter	Opponent	Undecided	Notes
John Forbes: 1st District		X			Former high school teacher
Joe Cavuto: 2nd District			X		Lawyer
Jonathan Goldenring: 3rd District	X			X	Mayor
Barbara Smith: 4th District			X		Deputy Mayor, business owner
Antonia Delgado: 5th District	X			X	Lawyer, community leader
Joshua William: 6th District			X		Retail store owner
Annette Sorensen: 7th District		X			Nurse

They then contacted the council offices to find out each member’s position on a licensure ordinance before determining the target. They discovered that among the seven council members, two supported a licensure ordinance, three opposed it and two were undecided, including the mayor. Since it is very difficult to change a “No” to a “Yes” vote, they decided to focus on the undecided council members and listed them as their targets in the strategy chart.

Stop Illegal Tobacco Sales Campaign members had good connections with the mayor, but they were poorly connected in the Latino council district that elected the other council member, Antonia Delgado. They knew they had to find allies who could reach Councilwoman Delgado. Since their connections to Delgado were weak, they identified a secondary target, the federal regional director of the Environmental Protection Agency (EPA). The EPA regional director was

considering whether a site in Councilwoman Delgado’s district should be cleaned up using federal funds. Delgado wanted the cleanup funds badly and had been lobbying the EPA director. The EPA director also worked closely with several members of the Stop Illegal Tobacco Sales Campaign on various clean air issues.

The leadership group determined that if the EPA already had decided to pay for the cleanup, maybe the regional director could be convinced to lean on the councilwoman and ask for her support on the licensure ordinance as a return favor. They put the regional director in the “Target” column as a secondary target. They were careful to note what power the campaign has with the secondary target and what power the secondary target has with the primary target. The core group also went back to the “Constituents, Allies and Opponents” column and added the Latino Health Clinic and Latin Americans United as potential allies. With these two steps, they hoped to strengthen their weak connections in the Latino community and put themselves in a stronger position with the targeted councilwoman

In each of these examples, political intelligence and insider information about governmental decision makers turned out to be very helpful in selecting targets and determining how to reach them. Many tobacco prevention coalitions do not include people who live in the world of politics and have such information. But you need it. If traditional allies cannot provide it, find new ones who can. Invite a friendly city hall staff member, a political consultant who runs local campaigns, or a grassroots “government watch” activist to join the team. They will help keep this strategy formulation process grounded in reality.

Column 4: Decision Makers/Targets

Stop Illegal Tobacco Sales Campaign

1. Primary targets
 - Mayor Jonathan Goldenring
 - Councilwoman Delgado
2. Secondary targets
 - Regional EPA administrator. Use site cleanup decision to encourage Delgado to support licensure. American Lung Association is key organizational partner in local EPA clean air campaign.

Tactics

Tactics are what people in the “Constituents and Allies” column do to people in the “Targets” column to get them to give the coalition what it wants in the “Goals” column. Tactics grow out of the specifics of the strategy; there is no such thing as a good tactic by itself, separate from the strategy it is designed to serve.

A turnout of 50 people in one town may really make waves, while in another town it is old hat. Doing the exact same action in one town before the election and in another town after the election is likely to produce very different results. Protesting about illegal tobacco sales at a local grocery store in one town unites the community and creates broad support for an ordinance. In another, the same tactic creates a backlash as the community unites behind its beloved benefactor. You must evaluate each tactic in the context of the overall strategy and local conditions. You complete the tactics column last because tactics are dependent on the context of the campaign.

Deciding on the right tactics is a challenge. After you select your targets, how do you go after them? Should you be militant or low-key? Organizations and individuals often disagree about which tactics are appropriate, but the first question is, How much power do you have in the relationship? How much do the targets already agree with you? The less power a group has, the louder it needs to be. Boisterous and confrontational tactics can convince an officeholder to cooperate. When you have a lot of power, or when the targets largely agree with you, you do not have to do much shouting.

Should you risk the good relationship you have with an officeholder by being confrontational just because she does not agree with you on the specific issue? After all she has supported you in the past and you hope she will in the future. Begin by answering this question: Why was the officeholder supportive in the past? Did she have a good personal relationship with the chair of the organization? Was it her issue anyway, and she would have been supportive with or without the group’s intervention? Or did she respect the group and fear that if she didn’t support the issue, she might suffer a loss of support? You want to be able to give the last answer. If you cannot, the other answers will not get you very far in the future so you need to carefully organize your campaign in order to build your power.

Checklist for Tactics

All tactics must be considered within an overall strategy. Use this checklist to make sure that each tactic makes sense given your strategy.

- Can you really do it? Do you have the needed people, time and resources?
- Is it focused on either the primary or secondary target?*
- Does it put real power behind a specific demand?*
- Does it meet your organizational goals as well as your issue goals?*
- Is it outside the experience of the target?*
- Is it within the experience of your own members and are they comfortable with it?*
- Do you have leaders experienced enough to do it?
- Will people enjoy working on it or participating in it?
- Will it play positively in the media?

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All of the checklist questions are important but the ones with an asterisk reflect the five basic criteria for a good tactic.

- **Is it focused on the primary or secondary target?** If the tactic is focused on an opponent, like a retailer or the local newspaper, it is not focused on the target.
- **Does it put real power behind a specific demand?** A vigil or demonstration where participants carry a picture of their loved ones lost to tobacco disease but do not demand that someone (named) do something specific, does not meet the test.
- **Does it meet your organizational goals as well as your issue goals?** Deciding to support a compromise licensure bill that contains no licensing fee and splits your campaign committee into opposing camps is probably not a good tactic.
- **Is it outside the experience of the target?** Not all tactics will meet this criterion, but the ones that do will have the greatest impact.

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- **Is it within the experience of your own members and are they comfortable with it?** People will vote with their feet and simply not show up if they are uncomfortable with a particular tactic.

Securing media coverage is an important tactic. We will begin by examining the most effective techniques and tools for securing coverage and then explore additional tactics that use media to enhance their impact.

Menu of Tactics

Getting Media Coverage

Before deciding to move forward with using the media as a communication channel, consider if your story is newsworthy. Is it something the media is going to care about? What's the hook—is it new and interesting, the latest information or a controversial topic? Consider what angle will appeal most to particular media outlets. Reporters want stories that inform, entertain or expose something not widely known. It is important to understand for every media outlet on your list, who is their audience and what are their needs. When working with a specific outlet, tailor your messages to their audience. Reporters must be convinced their readers, listeners or viewers will be interested in or benefit from the story. For example, someone who reads the Wall Street Journal may have very different needs and ideas than someone listening to their local radio station. The type of letter published in a health journal is far different from what a community newspaper will publish. While the message you want these people to hear about *The STORE Campaign* may be similar, the supporting facts, stories and examples you use to sell your position will be very different for each type of outlet.

▼ **Compiling a Media List**

Putting together a list of local and regional media outlets that cover your issues is the first step in conducting media relations. Call the media outlet and find out the name and phone number of the person in the following positions: Newspaper – City Desk or Editor; Radio – Assignment Editor or News Director; and, TV – Planning/Assignment Editor. However, news about *The STORE Campaign* can be pitched to a variety of editors and reporters, including city editors, health editors, business editors and reporters who cover politics and law. Keep in mind that turnover for reporters and editors is high, particularly in local media markets, so make a point to contact the outlet you are interested in to verify the contact's name and title. Remember to include alternative media outlets such as newsletters and Web sites published by groups such as the local chamber of commerce, community service organizations or health advocacy organizations.

▼ Media Tools and Opportunities

Local media are important communication channels for delivering tobacco education and prevention messages, and will play an important role for *The STORE Campaign's* statewide or local activities. Whether your community is considering a retailer licensing policy, a ban on all self-service tobacco displays or trying to enact a tobacco-related zoning ordinance, media coverage will help you raise awareness and garner support for the change. It also will help generate discussion about the public health implications, and pre-empt or diffuse any tobacco industry or opponent's claims that tobacco control at the retailer level is unnecessary government regulation.

The following media relations tips, tools and reminders will assist you in your efforts to frame *The STORE Campaign* issues and obtain positive and persuasive media coverage.

You must have new, interesting or controversial information to garner the attention of the media.

Press Conferences and Media Events. Hosting a press conference or event is a standard strategy for generating media coverage, but must be used strategically. Most advocacy can be handled by issuing press releases and directly pitching reporters; however, if your announcement is particularly newsworthy, then holding a press conference or inviting the media to attend your event is appropriate. How can you tell if it is the right move? Do you have something breaking to announce? Will it be worth reporters' time to travel there? Do you have great visuals with lots of color and interesting speakers? When planning a press conference or media event, consider the location of the event, the time it is held and what other newsworthy events are happening on that day or time.

Media Advisory or Alert. The purpose of a media advisory or alert is to invite reporters to attend your press conference or media event. Sent out days in advance of the event, the alert briefly and clearly summarizes the Who, What, When, Where and Why. Follow-up with reporters or editors one to two days before the event to confirm their attendance. Reporters work on a short lead-time, so do not send information about your event weeks in advance. See sample [Media Advisory Format](#).

Press Release. The purpose of a press release is to generate media coverage of an event, announcement or new development and to package the information, story and quotes the way you would like them covered. The release is typically issued the same day as the news occurs (at a press conference, by fax or email), although you may issue it in advance of the event. If you send out the release early, protect the newsworthiness of your story by embargoing the release for a specific date and time. This information will alert the reporter the story should be held for publication until the event occurs. See sample [News Release Format](#).

Video News Release (VNR). A VNR is television's equivalent of the written press release. VNRs are pre-produced television news stories

that have a series of sound bites from various experts such as store-owners, community members and teens, and footage from an event. The benefit of a VNR is it allows you to transmit an unfiltered, unedited message to television stations to tell an accurate and concise story. A VNR should also include b-roll (raw footage) and interviews to enable producers to create their own segment. Slates summarizing the footage may also be included.

Letters to the Editor. Writing a letter to the editor remains one of the most effective ways to express a point of view. It can be used to correct misinformation in a negative article, or to thank the newspaper for positive coverage of an issue and to reiterate your key messages. The advantage of writing a letter to the editor is you have the ability to make your points and deliver your key messages without interpretation from a reporter. An effective letter is clear, concise and relevant, uses simple sentences and puts the most important facts first. Keep the tone logical and factual, not emotional. As all newspapers reserve the right to edit for length or simplicity, writing a short (2–3 paragraphs, 250 words), clear, organized letter increases the chances of it being published as you intended. Do not forget to sign your name, it will not be printed without it. See sample [Letters to the Editor](#).

Op-eds. An op-ed is a written commentary or an editorial reply that is published opposite the editorial page of a newspaper, hence the name “op-ed.” Like letters to the editor, an op-ed allows you to have an unfiltered and unedited voice in the most widely read pages of a newspaper. Op-eds generally have more impact than letters to the editor. They should be reserved for articulating a significant point of view that cannot be communicated effectively in a brief letter. Check the publication’s policy and lead-time, but a good rule of thumb is to limit your op-ed to 500-700 words. Call the editorial office in advance to let them know you are sending in the op-ed and why. When submitting an op-ed to a major daily paper, it must be an exclusive (i.e., you agree not to submit the same article to other papers in the same market). Weekly and smaller community newspapers may not be as concerned about exclusivity, but be sure to check their policies. If you are developing a long-term relationship with the smaller papers, it is a good idea to offer them exclusive material as well. They will appreciate the fact you produced material especially for them. See sample [Op-eds](#).

Pitch Letter. The purpose of a pitch letter is to explain to a reporter, editor or news director why he or she would want to cover your story or address your issue. It should make the case of how your story relates to their audience, why it is interesting or relevant and how it is newsworthy. The pitch letter may be a follow-up to a phone conversation with a reporter and generally accompanies other written materials such as fact sheets, case studies, press releases or other program materials that serve as background information. When pitching a story, be aware of the lead-time of magazines and periodicals as well

as the deadlines of other media outlets. A pitch letter is not used for breaking news stories. With that in mind, you should not expect instant coverage in the next day's paper or on the evening news.

Press Kits. Press kits are packets of information that can be distributed at a press conference or event, or given to a reporter to provide background information for an interview or news story. The information included should be relevant, brief and easy to scan for the main ideas. Press kits can include: a press release; fact sheets on the event/issue; supportive medical studies, statistics or data; photographs; brochures and other printed program materials; and positive editorials or op-eds from your local papers.

*Use a variety of
“free” media tools
to communicate
your message.*

Calendar/Announcements/Bulletin Boards. To increase the visibility of your meetings, events or public participation forums, consider submitting location information for local media outlet Calendar listings. The Calendar listing (also referred to as announcements or bulletin boards) is the section of the newspaper, or a time slot on radio/TV where community events and activities are listed or announced. To increase the likelihood of having your meeting included in the Calendar section, send your announcement well ahead of the event. Media outlets have deadlines a week or more in advance—some even as long as six to eight weeks in advance. Call each media outlet to verify the deadline to assure your chances of getting coverage and if your event date changes, notify the media outlet immediately.

Features. Feature stories differ from news stories because they tell the story of the subject rather than just identifying the facts. The key distinction between a feature story and a news story or editorial is that a feature story has the purpose of both informing and entertaining the reader, and does not advocate a position. Features can be profile stories on people or places, or they can take a strong human-interest angle. Feature stories are typically found in magazines and newspapers. Feature writers have longer lead times than most reporters in addition to having more column space to tell their story. Pitching a features reporter to profile your story may take longer as well. It begins with a telephone pitch, accompanied by a pitch letter and your background documents, and if the reporter is interested, may include many more conversations and arrangements for interviews.

Media Roundtables. An additional way to cultivate relationships with the media is to invite them to a roundtable, breakfast or special briefing session. The format includes 20-30 minutes of presentation. After the presentation, allow for questions and answers from the media in attendance. Face to face meetings can often yield the most positive press coverage.

Editorial Board Meetings. Editorial board meetings are opportunities to discuss long-term processes such as changes in laws and policies, strategic plans and goals for reducing youth access to tobacco. Contact the newspaper's editorial page editor to schedule a meeting.

Most media outlets will ask you to send a letter requesting the briefing and listing the issues to be discussed and the participants. Find out the paper's protocol and get to know the editor's assistant. He/she can be your ally in making sure the editor is aware of your request. Before scheduling the briefing, determine who should attend. Outline the points you plan on presenting and decide who will discuss which issues. Be sure everyone on the team has a consistent message and can clearly articulate the goals, mission and strategies of *The STORE Campaign*. Provide the board with as much written information as possible in a press kit. At the meeting, request they write an editorial. If they decline, then offer them alternatives, such as printing an op-ed piece authored by an expert on the topic. After the meeting, follow up with a phone call or a brief letter thanking the editorial board and reiterate the importance of publishing an editorial on your issue.

Radio and Television: Public Affairs, News Talk, Commentaries.

Public affairs and news talk shows can be great forums for in-depth discussions of issues affecting your community. The first step in getting on the air is to familiarize yourself with the public affairs and news talk programs on radio and cable television stations in your area. Be sure to acquaint yourself with the format of the programs, noting whether they feature in-studio guests, live call-ins, panel discussions or taped programming. Although a number of these shows air in the early morning or on the weekend, others air Sunday mornings between key national public affairs shows, providing a prime opportunity to reach opinion leaders. The length of these programs is typically either 30 minutes or an hour.

Some local radio and cable television stations accept commentaries/editorials from listeners. For on-air commentaries, call the radio, cable or television station and ask them if they accept commentaries/editorials from listeners/viewers. Find out their protocol: Do they want to see a script? How long should the commentary be (30-60 seconds)? How do they want to receive it (fax, mail, etc.)? Most stations will ask you to come to their studio to professionally record your commentary/editorial.

Radio Interviews. Radio interviews are similar in logistics to television, except on radio you have only your voice to sell your messages and interest listeners in your topic. Radio stations are generally smaller than TV studios and more distracting. The technicians are in full view and visual cues are used. Before the interview, find out how long the segment will run and whether it is live or taped. If it is taped, you can stop and ask the interviewer to let you rephrase an answer, particularly if you cough or sneeze during your soundbite. If it is live, just continue delivering your messages unless you need to correct a previous misstatement. Many radio interviews are conducted over the phone. If you are being interviewed, do not use a speakerphone and avoid using a cell phone. Also, use a quiet place to make your call so ringing phones and other background noises do not interfere with your interview.

Paid advertising offers the advantage that you control 100% of the message.

Paid Advertising. Unlike earned media activities when you try to get the news media to cover your activity and, hopefully use your key messages, paid advertising allows you to control 100% of the message being delivered. Message delivery is not dependent on a reporter's interpretation of your story. Keep in mind, however, an editorial or news story supporting your messages brings an implied third party endorsement (the news outlet's) that paid advertising does not supply.

There are many mediums that accept paid advertising at varying levels of cost. Television is the most expensive, but also the most intrusive medium, complete with sight, sound and motion capabilities. TV ads are restricted by the fact that your message must be delivered in a 30- or 60-second format. More affordable mediums include radio, print (newspapers and magazine) and outdoor (billboards/posters). Each medium performs a different function and is more or less appropriate depending on the objective of the campaign and your target audience. Newspapers and print publications target audiences with a one-day, high-reach impact. These print publications allow you to deliver a more complicated message. Many newspapers and print publications also target specific ethnic audiences. Radio is a good medium for cost-efficient, targeted marketing because the stations' specific formats can be matched to a specific audience. However, the message is restricted to 60-second commercials. Outdoor advertising, including painted bulletins, billboards, bus sides, benches and shelters are cost efficient and can be pervasive in their reach. Depending on the message and the creative execution, outdoor offers an excellent opportunity to have high reach and frequency exposure. If you are considering buying advertising space, if possible, it is best to consult with a professional media buyer or consult with the American Lung Association's Communications Assistance Project. If this is not possible, make sure you know who your target audience is (i.e., adults, teens, key opinion leaders), and make sure the media outlets you are considering using reaches them.

Public Service Announcements. PSAs are "commercials" aired free-of-charge by radio and television stations to promote a non-profit subject or event. To submit your PSA to a radio station (they run PSAs much more often than television), call the station to determine the correct contact person, usually the public affairs director. Also ask about the station's PSA requirements, including length and lead-time. If you buy ad time with a radio station, make running your PSAs part of the deal. Dates, times and frequency are at the discretion of the stations' management. The climate has changed in the nation's tobacco control movements recently and you are no longer seen as the monetary underdogs by the media. Getting PSAs placed is not as easy as it used to be.

Remember the first question you asked yourselves as you prepared to involve the media: Is your story newsworthy? Will the media be

interested? To help answer these questions in the affirmative, use the next batch of tactics. These tactics create news, visual interest, conflict and even confrontation. All attract the media if pitched properly. The Communication Assistance Project of the American Lung Association of California is funded by CDHS/TCS to provide technical assistance and training to CDHS/TCS contractors. If you need help to determine if your story is newsworthy, contact the Communication Assistance Project at (530) 897-4140, x 302.

▼ Follow-up

Following up with the media on the phone is appropriate and usually necessary to ensure coverage, but do not hound them. Know your key messages and be clear and concise when you talk to the reporter, editor or news director. Before you call, be familiar with the media outlet and know what kinds of stories it typically runs. Avoid calling when you know someone is working on a deadline; for daily newspapers, that is generally after 3 p.m. and for weeklies, Thursday afternoon. Radio and TV deadlines vary, but avoid calling during the half-hour before news airtime. Mornings are best for both the electronic and print media.

Direct Action Tactics

▼ Petitions

Petitions can be powerful and help build the organization, but they need to carry the right message, be signed by the right people, and be delivered to the right target, at the right time. For example, a good use of petitions would be to circulate them in a council district in which the incumbent won by a narrow margin and the signers are pledging to vote against the incumbent if she does not support the ordinance. Even better is if some of the signers supported the incumbent in the last election, and the petitions are delivered during an action covered by the media, right before the next election.

Contrary to what many elected officials would have you believe, such petitions are extremely powerful. Some will say they would rather receive a few thoughtful letters than a thousand signatures on a petition or form letters. They are not lying. They would really rather see two letters than a thousand names, because the thousand names, in the context of a direct action campaign, represents a real challenge to their base of support.

To make certain that the petitions help build the coalition, follow these helpful tips:

- Keep the message short—a couple of sentences followed by a few bullet points—so that it can be read and understood quickly.

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- Have no more than ten signature lines per page. The names will be legible and allow you to contact the signers in the future, and the pile of petitions will be large on the official's desk.
 - Ask everyone who signs to volunteer. Get phone numbers and email addresses of those who do.
 - Emphasize quantity, not quality. Thank those who do not want to sign and move on.
 - Go out in teams. It is more fun. An organized petition day beats asking people to fill their quota alone at their own pace.
 - Never give away original signed petitions; give away only the copies you make.

▼ Letter Writing

Tobacco issue activists are used to receiving action alerts requesting letters be sent to elected officials in state or federal government just prior to important committee or floor votes on a tobacco issue. Your letters are among hundreds if not thousands of such letters that pour into government mailrooms. It is a different situation at city hall or the board of supervisors. Ten or twenty letters from residents of a district on a single subject are a big deal.

Prior to meeting with the target official, collect 20 letters from district voters. Mail ten in the week before the meeting and deliver the other ten personally to the official at the meeting. In each letter, the writer should request support for the issue and acknowledge a connection to a larger organized effort. Get as many letters as possible as the key decision approaches.

How many signatures on a petition and individual letters are enough? That depends mostly on the past experience of that official. Does the office often get 25-30 letters on a controversial issue? If so, you need 50. If the most signatures an officeholder has ever received on a petition is 500, get 1,000. The number you need is relative to the expectations of the target.

The best setting for producing letters is a supportive, seated audience like a meeting or church service. Have a short sample text available for those writing letters and bring a laptop for people to dictate short letters. Collect and mail all the letters.

▼ Turnout Events

All the other tactics for influencing a public official rely on turning out people to a meeting, a demonstration, a hearing, a teach-in, or an accountability session. Turnout is a measure of strength every officeholder understands. The officeholder remembers how difficult it was to get 50 people to her campaign rally during the last campaign. When

she sees 100 determined voters from her district turning out for an event, she will understand the power of your coalition.

Getting large numbers of people to come to events is the essence of applying pressure on key decision makers, and there really is only one way to do it—telephone work.

It is best to call from a central location where you can coach the callers and maintain a centralized database. The general rule is that of the people who agree to come to an event on the second confirming phone call, half will come, and it takes seven calls to get one “yes.” The phone work calculations for a turnout event of 40 people are described in the example below.

Sample Phone Work Calculations

Turnout for Meeting with City Council Members

Goal: 40 people

Coalition regulars: 12

From other groups: 8

From phones: 20

Necessary to confirm 2x needed names: 40

Number of calls to get 40 confirmed (7x40): 280

Number of calls per person per hour: 20

Number of person hours calling: 14

Number of calling nights and people at about 2 hrs/night:
2 nights at 3–4 people/night

For further information about turnout events, please reference Bobo K, Kendall J, Max S, *Organizing for Social Change, Midwest Academy Manual for Activists*, Seven Locks Press: Santa Ana, 2001.

▼ Visits with Public Officials

Your first meeting with a public official should not be confrontational. Bring three to eight people to discuss the issue and potential solutions. Later, if the public official has failed to be responsive, a larger meeting is warranted. This subsequent meeting should include 15 to 25 people to meet at the public official’s office. Further support can be demonstrated by organizing supporters to write letters to the public official prior to the meeting. Bring petitions and more letters with you to the meeting. Also follow these steps:

- Try to meet with elected officials, not staff or appointed officials.
- Know the official’s political background, including results of the last election.

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- Do not bring unknown, new people to these meetings.
 - A single spokesperson should run the meeting, including introducing the participants and calling on others to speak.
 - Have a specific demand (Support ___ ordinance) and a fall back demand (e.g., hold a hearing, do a study, etc.)

Note: CDHS/TCS funds may not be used to urge a “Yes” or “No” vote on a specific piece of legislation; however, other agencies in your coalition may be able to do so.

- Pin down the official to a specific agreement.
- If no agreement is reached, schedule another meeting.

▼ Public Hearings

You can stage your own hearing or participate in an “official” hearing scheduled by the council or board. There are many advantages to organizing your own hearing especially if you are facing a hard sell with the decision makers. For example, you will not be creating a forum for your opponents which an “official” hearing will do; and you decide on the place and time for the hearing to facilitate media coverage and a large turnout (at least 100) of your supporters.

Getting the targeted public official to attend your hearing is the first and greatest challenge. The coalition should be prepared to use actions and other public pressure tactics to get a reluctant official to attend. If the official will not attend, the hearing can proceed anyway with a panel of respected community allies.

▼ Mass Demonstrations

This protest tactic is best aimed at one target and success depends on turning out more people than normally come to such events. Locate the demonstration, having secured all the proper permits and licenses, where passing foot traffic will feed the crowd. Distribute literature to passers by and carry banners and signs communicating the issue.

▼ Accountability Sessions

An accountability session is a large turnout meeting with a public official that you organize and control. It is held in the community at a venue you select. To have the desired effect, some of the participants need to be past supporters of the official who the official will recognize. During the meeting, your coalition members will present prepared personal statements to a panel of community leaders. The official is not permitted to respond until the panel asks its questions and makes its demands. The objective of the tactic is to force the official to make a commitment at the meeting to support the issue. See [Checklist for Holding an Accountability Session](#).

▼ Educational Meetings and Teach-Ins

An educational event is designed to inform people, generate publicity and show strength. It is not aimed at the target, but one speaker should describe the coalition's campaign and how to get involved.

▼ Elections

Most organizations in tobacco control coalitions cannot endorse candidates, but the election calendar is still very important. A targeted officeholder is much more vulnerable in the months before the election. Sometimes, that vulnerability is greatest in the primary election, sometimes in the general election. At the county level, these elections occur in March and November of even numbered years, but in cities local ordinance determines election dates. Check the local election code.

Column 5: Tactics

Stop Illegal Tobacco Sales Campaign

The following are examples of tactics, listed more or less in the order in which they might be used in the Stop Illegal Tobacco Sales Campaign. Please remember that some of the tactics listed may not be appropriate for a CDHS/TCS funded agency to lead and conduct, but they may be appropriate for one of your coalition members.

- Submit a press release featuring results from recent youth purchase surveys.
- Organize informational picket line at store with poor record on illegal sales and alert the media.
- Organize a kick-off press conference.
- Make the ordinance an issue at election time, especially with undecided council members up for re-election.
- Start a postcard campaign targeted at undecided council members.
- Hold a rally at park across from a grocery store well-known for selling tobacco to kids.
- Organize a public hearing immediately before the scheduled council vote.
- Conduct an accountability session with the councilman from the 5th District.

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