5294

POLICY PROJECT PROPOSAL DEVELOPMENT WORKSHOP

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Organizers, Trainers and Authors

Mission Statement and Institutional Identity

Telling the world who you are: Institutional Identity

In order for an NGO to gain respect from government officials, potential members, reporters, funders, and other NGOs, the institution must construct a recognizable and credible identity, and then present that identity professionally and sharply.

In themselves, institutional identity materials should state that the organization has expertise and credibility. Written and graphic materials should portray the image you seek to relay -- whether that image is one of academia, stability, creativity, youth, etc.

What is your image?

How do you present your NGO to the world? There are certain materials every NGO should have. These include:

- name and logo
- file folder printed with logo to contain materials
- brochure outlining mission and goals of the NGO
- list of members
- collection of newspaper articles quoting or referencing your NGO
- registration form
- issue of NGO newsletter

Clear, professional and attractive institutional identity materials are essential for every part of your work: fund raising, membership building, legislative advocacy, coalition building and press work. Good materials will help identify you as a leader.

How

Professional graphic design firms are available to design and/or write institutional identity materials. In some cases, NGO members or associates are writers or artists who can volunteer their services. If it is impossible to hire an outside professional, or to receive an in-kind service contribution, you or a staff member can design and produce materials. They can be simple in nature -- they do not have to be expensive to be effective -- as long as they are professional.

Keep in mind basic rules of design and writing:

-- use white, cream or light gray paper for core materials
-- "white space" on a page is important -- leave plenty of it
-- fonts should be consistent throughout individual materials
-- avoiding "busyness" on a page
-- keep headlines short, bold and powerful
-- generally, use no more than two photos/charts/graphics per page
-- orient the materials for your target audience

-- you can never relay your message too often
-- choose powerful words in your writing
-- keep sentences and paragraphs short

Ask yourself these questions when you examine your materials:

- ☐ Does the design grab my attention?
- ☐ Is there too much text on the page?
- ☐ Are the photos too small?
- ☐ Would I be interested in reading this?
- ☐ What does this image say to me?

Selling ideas: Message Development

The first step in any successful issue advocacy campaign is to develop strong and clear messages relating to the policy issue at stake. These messages must be able to "grab" your audiences and simply relay in understandable, emotional, and human terms the reasons underlining your views.

The more complex and technical the policy campaign, the more important -- and difficult -- is message development. Extract from the complicated issue the basic reasons why it matters to Romanians. With a little exploration, you can find simple messages. No organization can win an issue that cannot be easily framed in a way that makes sense and matters to target audiences.

Messages serve as the campaign's centerpiece -- all communication activities should reflect those messages: advertising, media interviews, op-ed writing, lobbying meetings, public meetings, fliers, etc.

How

Every advocacy campaign has core messages that are used to convince government officials, Members of Parliament, coalition members, the media and the general public. Once messages are developed, use them over and over again -- they can never be repeated too many times.

Winning Messages:

-- are simple (usually no more than two sentences)
-- contain one streamlined thought
-- reflect images and ideas that are meaningful to target audiences
-- mirror society's values and mood

But before your NGO to can develop campaign messages, both audiences and ultimate goals must be clearly understood. Unless you know how your audiences think and believe, it will be impossible to design messages that affect or move them.

Usually messages tap into one of a handful of universal themes to strike a chord with audiences. If the audience is not touched, it will not act.

The following are themes that matter to most people everywhere:

family	the future	children
the elderly	safety	security
jobs	growing the economy	protecting freedoms
truth	fairness	

Examples of messages from U.S. campaigns:

Tobacco industry messages to general public in response to increased smoking restrictions in cities and states. These messages are relayed over and over again -- in newspaper advertisements, in newsletters, and in letters to Congress and government agencies. The point of these is to make people angry.

* A minority of extremists is threatening the freedom of people to live as they choose.

* The government has no right to tell people how to live.

* This is an outrage -- Americans are beginning to lose their most basic freedoms.

* Anti-tobacco behaviour is a slippery slope. Cigarettes today; hamburgers and chocolate cake tomorrow?

Utility company messages to general public and Congress in response to efforts by manufacturing industries to deregulate the U.S. utility industry. These messages are relayed over and over again in media interviews, in fliers and brochures, in press kits, in materials sent to Congress, and in advertisements. The point of these is to make people afraid and angry.

* Don't leave the elderly without electricity in the dark and the cold.

* It's not fair that those who can least afford it will suffer through higher rates.

* Big business will win; little guys will lose.

* Big government has no right to meddle in the lives of families and small businesses with something as important as electricity.

CHOOSING YOUR PUBLIC POLICY ISSUE

A. PUBLIC POLICY

Public policies are plans, principles, procedures, laws, regulations and actions, which are adopted by decision makers in order to "solve a problem of the society, to face a threat or to fulfil an objective."

They are not prepared only by the Parliament, but by any decision making body (Local council, Board of directors, board of teachers, etc.)

Example 1. National policies
A well known NGO has succeeded to amend the local election law in order to accept an unlimited number of internal observers in the election process.

Example 2. Local policies
Environmental NGO's in a county can work towards establishing a local environmental committee that includes local councils, NGO's and business sector.

Example 3. Internal policies of other institutions
The internal regulations of a Romanian kindergarten were not allowing the access of HIV infected children. The initiative of a group of parents group has changed this regulation, the educational process being now open for HIV infected children.

In a broad understanding, public policies can:

- forbid behaviors that are representing a threat for the society as a whole (e.g. murder or corruption)
- protect activities, citizens, or other entities (e.g. monuments or minorities)
- promote (e.g. support nature based tourism or tax exemptions for different groups)
- offer direct benefits to citizens (e.g. free education and health care)

B. POLICY ISSUES

As a decision maker in a NGO you face problems in the society which have an impact on your organization or beneficiaries. Your concern must be to select a suitable specific problem and concentrate your activities on it.

A problem is a general situation which has a negative impact on a community. A specific problem is clearly defined. It can be a part of a broader problem. An issue is a specific situation you can focus your activity on and solve.

STEPS IN CHOOSING YOUR PUBLIC POLICY ISSUE

1. What is your organization's mission ?
A sentence which describes the organization: goal, activities, moral values.

2. Who are your beneficiaries ?
Who/What has a benefit upon your organization's activities?

3. What problems are your NGO/beneficiaries facing ?
What general deficiencies are affecting your organization's activities or your beneficiaries' quality of life?

4. What issues make up the problem?
Split the general problem in characteristic and clearly determined components.

5. What public policy determines the specific problem existence or absence?
Is it a law, government decision, an internal regulation? Is there a need to create a regulation, to amend or enforce an existing one?

6. Who makes the decisions regarding the identified public policy?
Who has elaborated the policy? Who can adopt a new one/change/implement it?

7. Formulate your identified public policy issue. The statement should include:
   - The specific problem
   - The determinant public policy
   - The decision making body

Criteria for selecting you public policy issue:

- Is the specific problem perceived by a significant number of people?
- Has the problem a real impact?
- Has the problem a clear target?
- Can you win?
- Does it ask for acceptance/rejection from the population?
- Is the statement understandable?
- Does it have the potential to motivate people?
- What is the impact (direct or indirect) of solving the problem on the development of the organization?
- Will the life of your beneficiaries improve after the problem is solved?
- How much does it cost to solve the problem (financial and human resources)?

Demonstration of Need

Key Questions

WHAT IS THE PROBLEM (statement)

Who has the problem? How many people? (#)

social group, ethnic group, age group, a type of institutions, etc.

Where are they? (geographical) and level:

- local
- national

How long has the problem existed? (time frame)

Why does the problem exist?

- generally
- specifically

How can you support your problem statement?

- statistics
- letters
- questionnaires
- newspapers
- other supporting documentation

What are the consequences of not solving the problem?

Why is your organization suitable for approaching this problem?

- representativity
- activities, successes
- corollary activities

Advocacy Strategies*

Choosing the appropriate strategy based on the level of resistance

After you have chosen your issue the next step is to strategize. Strategizing is the daily work of the organizer. Strategizing requires always looking to the future and to the ultimate outcome of your campaign. It keeps the focus of your campaign both on the ways to win the campaign and on the ways to strengthen your organization. Strengthening your organization can be realized by increasing membership through choosing tactics that appeal to a broad base of people. It can also be achieved by choosing tactics that can educate and develop the leadership skills of your current membership.

Roland Warren, social change theorist, developed a theory of choosing strategy based on the amount of agreement/disagreement between your organization and your target(s). He suggests that the level of disagreement that you have can help you in determining the strategy/strategies that you employ. Based on his theories, we have developed three types of advocacy campaign strategies.

Informational Strategy
Collaborative Strategy
Confrontation Strategy

Informational Strategy: Assumes that your target (s), the general public and other organizations do not have enough information to make a decision regarding your issue. Therefore, your organization must spend time educating people on the importance of your issue. The Informational Strategy most often includes the use of the media and other promotional activities. Other tactics include teach ins, round table discussions and debates. The purpose of Informational Strategy is to reach an agreement, so that people (the general public, other NGOs and the target(s)) can be moved to action on your issue.

Collaborative Strategy: Assumes that concern about the success of your campaign is shared by the public, other NGOs and even your target(s). There are no apparent major philosophical
disagreements that will arise. Therefore, it is the role of your organization to facilitate a common message and course of action for the campaign. Some tactics that can be utilized include; coalition building, providing expert or supporting testimony and holding joint events (meetings, press conferences etc.).

Confrontation Strategy: Assumes that the disagreement is so intense that discussion, negotiation and dialogue will not work. Targets do not or will not recognize your issue and (sometimes even) your organization. Most often in this situation if your organization wins the advocacy campaign, your target will stand to lose something. Common tactics in a confrontation strategy includes mass demonstrations, strikes, boycotting, ridiculing the targets in personal activities.

Based on Power: A Repossession Manual by Greg Spencer (Citizen Involvement Training Project (CITP).

Strategy of Information

The strategy of Informational is the strategy that is used in every advocacy campaign. One of the underlying goals in all advocacy campaigns is involving the public, other NGOs and even your targets. One way of involving them is by educating them on the importance of your issue. When employing the strategy of Information you must determine how to reach as many people as possible and how to make your message heard in the best way.

The advantages of using the strategy of Information is that it is relatively easy. There is often little or no conflict involved in providing information. Conflict comes later when you ask for decisions to be made and acted upon. Information can be inexpensive if you can convince media outlets to disseminate your advocacy campaign's message free of charge. Furthermore, it can be very creative, employing multi-media avenues to deliver your message.

One disadvantage of using this strategy is that it rarely works on its own. Education is generally not enough to bring about social change, action is usually required. Further, it is difficult to determine if you have effectively reached your intended audiences and targets with the message that you intended. Finally, if you do not have access to free media, it can be very expensive.

Questions to ask when implementing the strategy of Information:

- What are my goals?
- Who am I trying to reach? Is there more than one target? More than one audience?
- Is my organization clear on the steps needed to carry out this strategy? Have I prepared my members to know what to say and how to say it?
- Will some of the tactics used be interesting enough to sustain membership?
- Will this take us to the next step?
- What resources is my organization willing to commit to this strategy?
- How long will the strategy of Informational take?
- Should we hold special meetings with other NGOs? (collaborative strategy)?

Collaborative Strategy

Using a collaborative strategy means working together. Organizations and people have common values and therefore working together will help your organization reach its goal quicker and more efficiently than working alone. Using a collaborative strategy also means assessing the all aspects of society and utilizing all players in the implementation of your campaign. Besides the general public and the other NGOS, do other sectors of society care about your issue? Will they get involved as either supporters or funders of your cause?

Coalitions that spring from the implementation of a Collaborative Strategy begin as transitory bodies but can evolve into permanent issue orientated coalitions. For those of you who have already participated in building coalitions you know that it isn't easy, even if common values and goals are held. Coalitions can cause many frustrations and lead to many compromises during your advocacy campaign. For example, some NGOs that you are working with may want use strong and confrontational tactics while others may want to spend time negotiating to accomplish the campaign goals. Problems can occur in Coalitions because of the differences in size and reputation of each of the coalition's members. If you invite a larger, more well known NGO to join a coalition with you, it may get all the credit for your advocacy campaign. So even if your campaign is furthered, it may hinder the growth of your organization. Worse, in some cases, larger organizations may "swallow-up" small organizations.

Despite the shortcomings of a collaborative strategy there are many positives. You can reach more people and possibly advance your campaign quicker if you engage in a collaborative strategy. A collaborative strategy can bring about many more creative and interesting ideas and tactics. Your leaders can learn how other sectors of society and even other NGOs approach issues. More knowledgeable volunteers will make your organization stronger. One important advantage, in utilizing a collaborative strategy is increasing the human, technical and financial resources for the campaign.

When engaging in a collaborative strategy <u>a strong coalition facilitator is advised.</u>It is this person who can help you to reach a common vision, amongst the many competing interests. This person is particularly important when your campaign involves all sectors of society (civil, business and government). Even if you are the initiator of the collaborative strategy<u>, ground rules on how decisions are made and the rules of the coalition/collaboration should be set at the beginning.</u> Does a large group bringing large amounts of money and human resources have the same vote as a small newly established and poor group? These are the questions that have to be decided early on in the formation of this strategy.

Questions to ask yourself before choosing a collaborative strategy:

What will the campaign gain from utilizing a collaborative strategy?

Who should be the members of the collaboration/coalition?

What differing skills and resources will the coalitions members bring to the campaign?

Is association with one group or one individual going to negatively effect the campaign?

How will the members (volunteers and leaders) of your organization grow if you use the collaborative strategy?

Why would other NGOs, businesses and government officials want to join your advocacy campaign? What is their self interest?

What types of strategies will you use in order to involve other NGOs, businesses and government officials?

How much training will the collaboration partners need on the policy before we are able to move forward in our strategy?

Are there any specific individuals that we need as part of the campaign, that will help sway others (and/or our targets)?

Can the group be cohesive enough?

Confrontation Strategy

The Strategy of Confrontation is often the strategy of the last resort. When all other strategy and tactics fail, an organization may be forced to employ a confrontational strategy. Of course there are varying degrees of confrontational tactics as well, so when choosing to employ confrontational measures it requires a selection of tactics that gradually become more confrontational.

There are advantages of the confrontational strategy. They can be fun! Fun tactics can lead to great community support if they are done right. Another advantage is that they can lead to success. Many significant historical social changes have been the result of the use of confrontation in advocacy campaign. These include; the civil rights movement in the United States, the withdrawal of the poll tax in England, the woman's suffrage movement in the United States.

The disadvantages of the confrontation strategy is that it may alienate the public. Public support is essential for NGO to be successful, so if the confrontational strategy is implemented too soon, vital public support may be lost. Confrontational strategy may also cause your target (the person who can give you what you want) to try to repress your voice and opinion. Therefore, it is important that the message of your campaign is in the public arena (using Informational strategy) before you employ confrontational strategy.

What you need to think about before you engage in a confrontational strategy:

- What will the confrontational strategy get you? What are your goals.....Media support, community support? Support from your target?
- Are you sure that your members will support you if you use this strategy? Are people sufficiently aware of all the steps that you have taken in order to get you to this point?
- Will the strategy get you closer to winning?
- Have you picked the right target? If you have picked the right target are you sure that you are clear about what you are fighting about? What does your organization see the problem as being? What does the target see the problem as being? Are you sure?
- Have you done the right research?
- Saul Alinsky, one of the most famous community organizers from the United States, said that , " Sometimes the threat is greater than the action." If you are threatening to use a confrontational tactic, Is the threat real? To retain credibility, make sure that whatever you say during the advocacy campaign is true.
- Have you thought about the risks involved in implementing a confrontational strategy? Are you prepared for the risks?
- Have you analyzed all possible outcomes and planned for each one?
- How will the target respond to your tactic? How will you respond to their response?
- Is everyone involved in the tactic clear about what the responses are? (well briefed).
- Who do you need to contact before implementing your tactic? Will anyone be affected negatively by this tactic?
- Who should participate?
- How will you reach the media? How will the media respond to the tactic?

ADVOCACY CAMPAIGN STRATEGY/TACTIC CHART

INSTRUCTIVE ENGAGEMENT

- Identity Kit: Fact sheets, Style, etc.
- Press Kit for Free Media Opportunities
- Press Kit for Paid Media Opportunities
- Editorial Board Meetings
- Press Conferences
- Update Faxes
- Free Media Development
- Newsletter
- Posters
- Flyers
- Conferring with executive authorities
- Legislative Summit
- Public Service Announcements
- Issue-related free media opportunities
- Paid media
- Teach-ins
- Public Awareness Caravan
- Targeted mailings

COLLABORATION

- Jointly sponsored events
- Providing supporting testimony
- Filing friend of the court briefs
- Design collaborative service delivery
- Strategizing with allied authorities
- Volunteer campaigns
- Public Meetings
- Membership Drives

CONFRONTATION

- Street Action
- Providing opposing testimony
- Suing public authorities
- Targeting opposing legislators
- Disrupting government process
- Protests
- Shockers
- Citizen vs. Citizen activities
- Petitions

Objectives

1. List the long term objective of the campaign.

2. List the tactics that will help you achieve your objective.

3. Use varying tactics.
Will the tactic help educate people on your campaign?
Will it alienate people?
Make sure that the first few tactics that you choose are tactics that you can win.
This will help solidify support and help build momentum for your policy advocacy campaign.

Audiences

Who are the audiences of your campaign?
members
general public
allies
collaborators

How do you identify the interests of your audiences?
whose problem is it?
What do they win if they join?
what risks do they take by joining?
How much do they know about the policy issue?

Opponents:
Who is against your policy issue?
How strong are they?
How hard will they oppose you?

Media Targets

Once you have determined your audiences you need to identify what media outlets they access. These media outlets are media targets.

*Target the right reporters
*Target the right editors
*Target the right opinion leaders

Policy Advocacy Targets

1. Primary Targets
A person who has the power to give you what you want.
The target is always a person and never and institution.

If your target is members of parliament, break it down to individual members.

2. Secondary targets
Is a person who has power of influence over your primary target but does not have direct power over your policy issue.

Tactics

A tactic is always:
directed at a target
creative
fun
backed by support
in context

Tactics include:
media events
public hearings
strikes
law suits
elections
negotiations
teach ins
petitions
festivals

Resources

What types of resources will you need to complete this tactic?
Human?
Financial?
Technical (equipment)?

How much will be needed?
Be specific:
List numbers of staff
List numbers of volunteers
Estimate exactly how many fliers, newsletters etc. needed. Next estimate the cost of each flier etc.

Policy Advocacy

OBJECTIVES

An objective is an expected result, that will be obtained during the process of reaching the goal. The objectives are steps toward the achievement of the goal. When the objectives are reached the gap between the problem (issue) and the goal narrows.

The actual stage Ob.1 Ob.2 Ob.3 The goal

The objectives of a project must be created very carefully because, frequently, they are confused with methods. Methods describe ways which you will achieve your objectives. The objectives represent an end while the methods represent a means.

A way to test an objective, is to determine if the objective is "SMART". This means:

S- specific;
M- measurable;
A- achievable;
R- realistic;
T- timely

Therefore, an objective has to comply with the following characteristics:

- has to be an expected result, very specific;
- It must be measurable;
- must be possible to accomplish;
- must be realistic
- must be achievable within certain a reasonable time limit.

Audiences

External Audiences	Sub Audiences		
Public	Men	18-35	
		35-55	
		Retired Men	
	Woman	18-35	
		35-55	
		Retired Women	
	Celebrities		
Other Groups	Within sector/ Outside sector		
	Non-profit	Social Protection	
	Profit	Economic	
	NGOs	Human Rights/Democracy	
	Local level	Cultural	
	National level	Professional Associations	
	International	Unions	
		Universities	
		Institutes	
		Churches	
Authorities	National	Parliament	
		Parliamentary Committees	
		Ministeries	
		President	
		Army	
		Agencies	
		Institutes	
	Local	Judets	County Council
			Prefect
		Cities	Mayor
			City Council
			Department Chief
		Departments	
Mass-media	Electronic	TV	National
			Local
			Public
			Private

		Radio	National	
			Local	
			Public	
			Private	
		Internet	Homepage	
		Print	Newspapers	National
				Local
				Daily
				Weekly
			Magazines	Daily
				Weekly
				Monthly
				Speciality
Donors/Funders	Internal	Firms		
		Philanthropic Organizations		
		Foundations		
		John Q Citizen		
		Government	Local Level	
			County Level	
			National Level	
				-bilateral partnerships
				- multi-lateral
Partnerships				
	External	Multinational Corporations		
		Philanthropic Organizations		
		Foundations		
		Government/Embassy Assistance		
		Private Donors		

Internal Audiences

Members	General	
Leadership	Board of Directors	
	Committees	
Personnel	Management	
	Professional	
	Support	

Targets

Every advocacy campaign has a target. A target is always a **person**. The target is the person that has the power to give you and your organization what you want.

- A target is always one singular person, not an institution. Even if you are planning to change a law and you need the vote of the majority of the parliamentarians, you must personalize your target to make it just one person. Target one parliamentarian at a time.
- Personalizing your target makes it easier for your volunteers and members to understand and be motivated. Even the most complex organizations and institutions are made up of people, by choosing one person at a time you can make your campaign more real for the public.
- Each issue has more than one target. Use the target that is most convenient for your campaign. You can change targets or alternate targets during your campaign.
- Each tactic that you utilize should be directed at <u>one</u> of your targets. A tactic that is directed at all of your targets at once will be diffused and therefore not be as powerful.

Two Types of Targets

Primary targets are those people that are directly able to give you what you want. These are the people that you should direct your tactics towards.

Secondary targets are those people who do not have the power or authority to give you what you want but has the power to influence the primary target.

TACTICS

We will either find a way or we will make one! -Hannibal

TACTICS in an advocacy campaign are part of the overall strategy. When planning for an advocacy campaign you need to choose your tactics carefully. Your tactics should draw attention to your campaign but not scare people away from your issue. Your tactics should help you get what you want from your target and also help you gain more volunteers/members for your organization.

*General Rules for Tactics**

Tactics should...

- be focused on your target ...the target is the person who has the ability to give you what you want, make sure that your tactic demands something of your target.

- show that you have support behind your demand...*power is not only what you have but what your target thinks you have.* Make sure that your tactic demonstrates the strength of your organization. If you do not have a lot of people in your organization, don't hold a protest or a public meeting use a tactic that shows your strength in other ways. One small organization used a phone blitz..to try to get a meeting with the mayor the same people called the mayor over and over until they finally got their meeting.

- relate to your advocacy campaign and the goals of your organization....Your tactic besides making a demand on your target should also serve to strengthen your organization. You can strengthen your organization by getting good press coverage or by holding the event in the community where people can see it happen.

- be FUN!!! One way to keep your members, the general public and the media involved and interested in your campaign is to use tactics which are fun and creative. Use street theater to make a point, hold an anti-awards dinner honoring a target who you are not happy with.

- be creative and flexible...Using diverse and interesting tactics will help your campaign keep the momentum and keep the pressure on your target.

- always be changing...If your target becomes accustomed to the tactics that you employ, he or she will know how to react to the tactics, by changing the tactics you keep the campaign fresh and the target off guard.

- be in the experience of your membership but out of the experience of your target. Make sure that your members are fully engaged in the tactic that your organization chooses to use. If you use tactics that are outside their experience it will result in the alienation of your membership. Conversely, ALWAYS try to go outside the experience of your target. If your target is caught off guard, you will be in a better barginning position.

- include a constructive alternative...If the target says, "O.k. what do you want me to do about it?"...be prepared to tell him or her exactly what you want him or her to do.

* Excerpted from <u>Rules for Radicals</u> by Saul Alinsky and <u>Organizing for Change</u> by Kim Bobo, Jackie Kendall and Steve Max.

Some common Tactics include...

- Media events:

Media events are designed to serve two purposes. First, they announce your campaign to your target and second, they are often designed to speak to the general public about the objectives of your campaign. Media events should be carefully planned to demonstrate the expertise of your organization.

- Public hearings

Public hearings are meetings that are open to the general public in which your target is invited. A public meeting is held generally to gather information or more often to get a commitment from your target for action on your campaign. Sometimes, an organization is forced to engage in several tactics just to get the target to attend the meeting. The advantages of a public hearing include (according to the Midwest Academy of Chicago):

- ☐ It establishes that your organization is an authority on a particular issue
- ☐ It is an opportunity to do outreach to other groups and to the general public.
- ☐ It shows off your influential supporters (they can provide testimony in support of your issue.)
- ☐ It can be fun and it is not hard to do.
- ☐ It is good training for many leaders (chairpersons and floor team).
- ☐ It may be a good opportunity to get media coverage.

- Mass Demonstrations

Mass Demonstrations are a great way to demonstrate the show of power and support of your campaign by people. However, if you use a mass demonstration or a rally in your campaign twice it is imperative that the second one is larger than the first or it looks like you are losing support. In fact, once a mass demonstration is used it often doesn't need to be repeated..the memory of the Mass demonstration is enough for the target to know that your organization has support. One organization had a rally in which over eight hundred people attended, three years after the event the organization still used photos of the eight hundred people as a demonstration of their support.

- Petition drives and Letter writing campaigns

As a tactic petition drives and letter writing campaigns have little impact on your target and therefore are not the best means to have your message heard. Petition drives involve a lot of time and a lot of volunteers. They do however serve an important purpose, if the main goal of the petition drive is to do outreach for your campaign. If you do a petition drive be sure to get the names, the addresses and the telephone numbers of each person that signs the petition. These people can later be contacted to support you (volunteer, donations etc.,) in your campaign. A trick in petitioning is having one signature per page and bundling all the petitions together.

An organization in Chicago collected 10,000 petitions (with 10,000 names, addresses and phone numbers) bundled all the petitions together (20 stacks of 500 sheets) and carried them wherever they went . At public meetings they were placed strategically in front of any target , so the television cameras would capture their image. During lobbying meetings, the organizations would bring the bundles of petitions. The bundles of petitions became a symbol for all the public support the organization had.

- Teach ins

An educational meeting serves to inform the community and/or the target about your position. The meeting should inform but should also have a call to action. People should leave an informational meeting with a specific task. Your chairperson can educate at the meeting but they should tell the public how they specifically can get involved. As always, this tactic allows a great place for recruitment. Don't let people leave without getting their addresses and phone numbers.

One way to is to use the "task force" (or volunteer) sheet. The task force sheet should specifically address the issue that you are working on and provide a place for people to commit to working on your campaign. For example, if your issue to allow the use of green grapes in wine:

Yes, I believe that green grapes should be used in the making of fine Romanian wines, therefore I will:

________make phone calls to my friends and neighbors

________distribute newsletters

________attend future meetings

Please check the ones that you are able to help with.

Name________________________________

Address________________________________Phone________________

The best time to use the task force sheet is in the middle of the meeting. Break the action of the meeting and pass out the task force sheets, pass out pens or pencils as well. Wait for people to fill out the sheets and then collect them. By doing them in the middle of the meeting, people won't forget to fill out the papers.

- Law Suits

One way to pressure your target is through a law suit. Law suits can be advantageous because your case can be decided definitively in your favor. The drawback to law suits is that they can cost a lot of money and they can take months (even years) to finally be decided. It is a long process and it is hard to keep the momentum of your campaign high.

- Festivals

Festivals are a fun way in which organizations can get their message out to the public, both by attendance at the festival and through the media. The whole festival can be focused on fun, but should as with all public events have a recruitment angle. Furthermore, there should be a call to action. People should leave the event, knowing exactly who organized the event and why it was organized.

Some fun tactics:

- Award Dinners

If you are having trouble getting your target to a public event, make up an award and present it to your target. Once they arrive at the award ceremony, ask him or her for their support on your issue.

- Tours

Make the issue come alive for your target. Invite him or her to a place where the success of your campaign will have the most impact. A tour might not always be relevant for a policy issue campaign, but if one can be organized around your policy issue it can serve to personalize your issue for the target(s).

- Street Theater

If possible in front of the office(s) of your target. Put on a street performance on the justice or (in)justice of your issue. A street performance can be viewed by some as very confrontational so your membership should be ready for the criticism. On the other hand, if the performance is done tastefully, it can be used to attract public attention and usually can secure media attention and of course it is fun!

- Phone Blitz

When you are trying to get a meeting with a target and all the tactics you have used have failed. One confrontational tactic is the "phone blitz", the phone blitz is hundreds of phone calls to your target to force him or her to do what you want them to do. The phone blitz, accomplishes two goals; the first is that it usually irritates your target enough to get them to agree to a meeting or your request and second, it shows your target that you have support behind your demands.

Tips for Organizing a Public Meeting

Public meetings are excellent opportunities for citizens within a community, to meet with their elected representatives on either the national or the local levels.

At public meetings citizens have the opportunity to express their opinions and wishes regarding the political system. They can ask questions and discover how their elected representatives' will respond to a specific issue.

Public meetings also provide the opportunities for citizens and NGOs to convince Local Administration or Parliament representatives to take certain positions. Conversely, elected officials have the opportunity to inform their constituents about their present and future activity.

Before beginning the logistic preparation for your meeting. You and your members should be clear on exactly what the the purpose of the meeting will be. Each type of meeting will have will have a differing type of logistic preparation and a differing tone.

I. MEETING PREPARATION

A. Logistic preparation

All meetings should be held in an accessible place, so disabled people and older people can easily attend the meeting. The place should also be neutral, do not hold a meeting at a political party's headquarters, for example, you many alienate some of your participants and appear to be partisan the media and general public.
The meeting room's capacity has to correspond to expected number of participants. It is better to be insufficient places than to be unoccupied places.

All needed equipment and materials must be available (for example: sound equipment, microphones, paper, sign in sheets etc.). Make a checklist list of all needed materials before the meeting to be sure that you have brought everything with you.

B. Human resources preparations

The meeting has to have a moderator with a good reputation and a good rapport with people. The moderator has to be able to keep the discussions on the subject and make the participants comply with the schedule. He or she has to be both flexible and authoritative.
If the meeting's subject is a specific problem, the moderator does not have to be a specialist in that field. In fact it is better if the moderator is not an expert, if so, he or she may want to become involved in the discussion. The moderator's role is to moderate.

Sometimes, NGOs choose to have two moderators. One to moderate the meeting's rhythm and one to ask questions to the officials. Two moderators can help keep the energy of the meeting flowing and can serve to avoid monotony. The only condition is that the moderators understand and complete each other. However, you decide to organize your meeting. Be sure that your moderators are well prepared for the meeting and ready to handle any unexpected circumstance.

Public Meetings are a great way to involve your membership in your organization's activities. Aside from the moderator (s) you can have one volunteer introduce the goals of the meeting. One person keep time (if it is in a debate format). The "floor team" is the most important aspect of your public meeting. The floor team are members and volunteers of your organization that sit in the audience with the general public. The only difference is that the floor team knows is ready to support the moderator in the event that the meeting gets a little out of control. Other members of the organization can greet the participants, show them their seats and maintain the order.

C. Preparations

Be sure that everyone that is invited to the meeting has notice in plenty of time. Start informing people about the meeting at least three weeks in advance.

This includes the general public as well as the elected officials. Everyone should get a letter inviting them to the meeting followed by a telephone call, asking them to commit to attending the meeting. The letter should inform the public of the story of why you are holding the meeting and why it is important for them to attend the meeting. The general rule is that 50% of the people that promise to attend a meeting will attend. So a great effort needs to be put into getting attendance.

II. THE MEETING

A. Meeting management

The moderator has to clarify, from the beginning, the meeting's purpose.
The moderator has to establish, at the beginning, some basic rules, one way to do this is by reading the agenda and then voting on its content. That way everyone in the meeting, the participants and the elected officials know exactly how the meeting will unfold. If the meeting gets out of control the moderator can always go back to the agenda that was agreed upon by everyone.
During the meeting, the moderator has to do everything possible to keep the discussions on subject and to control the time and the rhythm of the meeting.
At the end of the meeting, the moderator has the responsibility to resume the conclusions, to clarify the next steps (ex.: What should the members do before next meeting? Which are the expectations of the elected officials?).

B. Information registration

At the entrance every participant is asked to give his name, address, phone number and important information for future contacts. This information is vital for the ongoing growth of your organization.
Proposals and conclusions should be registered.
Unclear aspects should be registered too.
Volunteers from the organization should be in charge of each one of these tasks.

C. Meeting's climate

Keep the meeting to a manageable time limit. One and one half hour is a good time, a meeting that lasts too long can discourage future participation.

III. FOLLOW-UP

A. Assessment of the meeting

Measure the purpose's achievement level. This can be done during the meeting.
Always hold a debriefing with all your volunteers. Verify your perceptions about what happened during the meeting, get their feedback about what could have gone better.
If the purpose wasn't reached, or something unusual occurred, try to find out why so it can be avoided in the future.

M. Maintaining the participation

If the representatives promised some measures and actions; after the meeting follow-up if they keep them and inform the participants.

How to lobby

In order to lobby efficiently, NGOs need to:

- ◻ constantly gather information about the legislative process
- ◻ maintain a good relationship with the legislators
- ◻ keep the NGOs members ready for a grassroots lobby campaign

Lobby can be done

- ◻ by few persons, in the lobbies of the Government or Parliament
- ◻ by as many volunteers as the NGO can involve in this

Methods

- ◻ personal visits
- ◻ phone calls
- ◻ letters
- ◻ mass media
- ◻ public hearings
- ◻ maintaining a good relationship with the parliamentarians

Personal visits

You can meet your legislator in the Parliament in Bucharest or in their office back in the county. Don't forget: the goal of such a meeting might be to persuade them to help you, but it might also be to inform them on your opinion about an issue. In both cases, the hidden goal is to meet the legislator and start a relationship with them. Adjust your attitude in order not to miss this goal.

Before the meeting

- ◻ schedule your meeting well in advance. It is worthier to do it by phone rather than to "chase" the parliamentarians on the corridors of the Parliament. Be extremely nice to the secretary, she might become your link to the legislator.

- ◻ once you've got your appointment, meet with your team and establish who are the persons to make the visit. Don't go alone, but don't take a whole crowd with you. The right number is around three or four persons. The team should include:

  - *a good speaker* (select a good, forceful speaker, who can make use of the right arguments without being very aggressive);
  - a person who will make sure the agenda of the meeting is followed through.

- establish the strategy of the meeting: how you will get the parliamentarian to agree with you and to commit to help you.
- *Always do your homework!!!* Research about the legislator: what is their voting record on the issue (very difficult to find out, still worth trying), which public statements on the issued did they make, what mutual friends you might have, what are their hobbies etc.

During the meeting

- come on time and dress suitably.

- Don't forget: do not feel intimidated by their popularity or importance: in this meeting you have the information they need.

- don't make the introduction too long, but don't forget to mention who you are, what organization you represent and introduce the persons who accompany you. After this short introduction get right to the point.

- Make them speak: you need to find out their opinion, so don't monopolize what is supposed to be a dialogue. If the parliamentarian is not so quick on speaking (very rarely met), make them speak by asking questions.

- listen well; even if the legislator is not directly asking you questions (very often met), you might still find out some information from what they are saying about their position concerning the issue.

- be honest and don't lie. If the legislator asks you a question you don't know the answer to, say so! Don't invent an answer in that minute, you might make a fool of yourself! You can say that you don't know the answer but you will find out and let them know later. If you so, don't forget to send the answer!

- when you talk about the issue, use jokes and personal examples to make it easier to understand and also more touching.

- don't degrade your opponents. State clearly the counterarquments to your opponents' opinion, but talk respectfully about them.

- take materials to the meeting and leave them with the legislator. Also, leave materials to their staff.

- if the legislator agrees with you, try to make them commit to helping you through a specific action (vote, take the floor, educate their colleagues, come to a public hearing).

- if the result of the meeting is not the expected one, don't become aggressive or rude. You might say you are disappointed, but don't threaten the legislator. After all, they have their right to an opinion, as we all do. Keep in mind your hidden goal.

After the meeting

- ◻ send the legislator a thanking letter, reminding them about the commitment they made
- ◻ if you promised to follow up with materials or with an answer to a question, do so.

Phone calls

You can call your legislator at the Parliament building in Bucharest or in their office back in the county.
It is not efficient when used by itself, it has to be combined with other lobbying methods. The more phone calls your volunteers make, the more efficient it will be.

- ◻ make phone call to your legislator 24 or 48 hours before a vote
- ◻ if they are not available for the call, talk to the staff person or leave a message
- ◻ be brief - ask for the support and explain why. Don't be rude or aggressive. It's only a phone call, there's no way they would be intimidated over the phone (they're not easy to be intimidated anyway, so don't even try!)
- ◻ try to have as many people as possible make phone calls and make sure they all know what they are supposed to say - give them written instructions and the message.

Letters

The more letters your volunteers write, the more efficient they will be. This method works best when combined with others.

- ◻ each letter has to have its personal look: don't write them on NGOs stationery, don't use form letters, do not type them.
- ◻ each volunteer will use their own stationary (if they have one) or blank paper; the letters have to be handwritten. *Usually, nobody reads more than the first paragraph, unless this one is really exciting.*
- ◻ write letters to your own legislator. Usually, they don't pay much attention to the letters sent from other counties.
- ◻ if you know the legislator, say this in the beginning of the letter.

- make sure you spell their name correctly, using the appropriate formula (Mr., Mrs., Ms. etc.)
- be short, concise and clear
- ask for action in the first paragraph
- send enclosures
- identify the legislation clearly, using numbers (e.g.: Law 70/1991)
- as in all methods used to get in touch with your legislator, don't threaten!
- thank the legislator for their effort and show your confidence in their acting the way you asked them to.

In sending letters, timing is very important: the letter has to reach the legislator not too early and not too late for the action you are asking for.

Mass media

It is a great way to educate (inform) more parliamentarians at the same time. Though, it cannot be used to persuade them.
In order to get journalists to cover your story:

- maintain a good media list. Keep it updated.
- create and maintain a good relationship with the journalists.
- have a someone to act as a spokesperson.
- read the newspapers in order to know what each newspaper is looking for in a story.
- find out the deadlines for sending news/stories to each newspaper.

Public hearings

A public hearing is a meeting between parliamentarians and citizens. It is a great way to make the parliamentarians state their opinion in public and commit to action.
A public hearing can be:

controlled - you invite certain people to attend it: leaders of NGOs, trader unions, members of you organization, a part of the media etc.

open - all the citizens can attend it.

In a public hearing, you want the parliamentarians to hear you opinion and arguments. So make sure you have people in the audience who will speak for you.

- even if the public hearing is open, make sure you keep some control of it: you also send personal invitations to people who are interested in the issue (civic leaders, journalists etc.) You also "plant" people in the audience who make sure the meeting is running smoothly, without any incidents.

- an open public hearing is a great way to recruit volunteers. Make sure you take enough materials and registration forms with you at the meeting.

Maintaining a good relationship with the parliamentarians

Your job would be much easier at the next lobby campaign if you cultivate your relationship with the parliamentarians.

- send your parliamentarians congratulation letters for all events

- invite your parliamentarians to the receptions you host

- send the parliamentarians all the materials you produce.

Most of the member of Parliament have a good sense of humor and they like little funny things to make them smile after a hard day. Also your originality might get their attention. When designing fun things to do as a lobbying method, use common sense.

An example of a fun thing:

put glasses with flowers and little notes in the room where the Commission will debate the draft law you are interested in.

How a Bill Becomes a Law in Romania

I. LEGISLATIVE INITIATIVE (=the creation of the draft law)

A legislative initiative can be introduced for consideration by any of the four means:

- the government
- any parliamentarian
- 250,000 citizens
- the president

The draft law is then submitted to any of the two Chambers of the Parliament in order to be debated.

II. PARLIAMENTARY DEBATE

First Chamber

1. The draft law is forwarded by the Permanent Bureau of the Chamber to the Parliamentary Commission in charge of the issue the law is focusing on.
2. The Commission analyzes the draft law and makes a report with the recommendations.
3. The draft law and the report are debated by the plenary of the Chamber which promotes the draft law.

Second chamber

1. The adopted draft law is submitted to the Permanent Bureau of the second Chamber which and passed to the appropriate Commission.
2. The Commission debates the draft law and makes its recommendations.
3. The plenary of the Chamber then debates and adopts the draft law.

Mediation Commission

All the differences between the two Chambers concerning the draft law are debated by the Mediation Commission.Unlike the Parliamentary Commission, the Mediation Commission is not permanent. Its members (seven senators and seven deputies) are appointed by the Parliamentary groups for each specific draft law. The Mediation Commission makes the appropriate recommendation through a report.

Back to the Chambers

The report of the Mediation Commission is adopted by the two Chambers

Constitutional Court

The draft law is analyzed by the Constitutional Court which makes sure it is perfectly constitutional. The Court has to decide this issue in five days.

III. PROMULGATION

The draft law is submitted to the President of the state who promulgates it. President can refuse to sign the law and send it back to the Chambers with his recommendations but not more than once.

How Can NGOs Be a Part of the Legislative Process in Romania

I. LEGISLATIVE INITIATIVE

A. Getting information

The NGO can get information about the intention of drafting a new law by:

- creating and maintaining a good relationship with a journalist accredited to observe the government's activity or, even better, with a member of the government
- creating and maintaining a good relationship with the members of Parliament from their county
- constantly searching for information in the media.

B. Opportunities

NGOs can have a part in drafting a law by

- asking to be consulted by the ministry/parliamentarian who is drafting the law
- initiating a draft law by gathering 200,000 signatures needed

II. PARLIAMENTARY DEBATE

A. Getting information

The first thing an NGO has to to in order to influence a bill in this stage is to *gather information* . It can do so by:

- having one of its members accredited in the Parliament, so the person can update the NGO on the legislation received by the Parliament for debate. The accreditation is very easy to obtain by submitting a request to the Secretariat of the regarded Chamber.
- creating and maintaining a good relationship with one of the members of the Permanent Bureau (information about how they can be contacted - in the Parliament Directory edited by PDA)
- creating and maintaining a good relationship with the person in charge of press relations in the regarded Chamber - names
- consulting the Parliamentary Directory edited by PDA to find out information about MPs.

The methods don't exclude each other, an NGO can use all of them. Still, the most important and most efficient method is the first one.

B. Opportunities

1. Parliamentary Commissions

The NGO can

- attend the meetings of the Commission (by submitting a request to the President of the Commission)
- testify to the Commission (in the same way)
- lobby the members of the Commission

2. Plenary debates

The NGO can

- observe the debates (through an accredited person, by requesting an invitation from the Secretariat of the Chamber or being picked from the main entrance by a parliamentarian)
- lobby the parliamentarians

3. Mediation Commission

The most difficult thing is to find out in time who are the members of the Commission. You can use the above mentioned methods.

The NGO can

- observe the Commission working
- testify to the Commission
- lobby the members of the Commission

4. Constitutional Court

If the NGO believes that the law passed by the Parliament is unconstitutional, they can lobby a parliamentarian to send it to the Constitutional Court and then lobby the judges of the Court.

This step requiters though the consultation of a lawyer.

III. PROMULGATION

The NGO can

- lobby the President to refuse to sign the law

But don't forget, they can only do this once. If the NGO manages to have the President reject the law, they have to go back to lobby the parliamentarians who, anyway, have the final word in this case.

Media Advocacy

Media advocacy

Media advocacy represents the strategic use of the media as a resource for advancing a social or public policy initiative. It involves techniques inspired from public relations, political campaigns, lobbying, advertising and investigative journalism. NGOs are able to reshape issues and focus on symbols of public debate.

Media advocacy is used whenever the media becomes the arena for disagreement with public policies. A media advocacy campaign is more like a political campaign in which competing forces are reacting continuously, rather than a static educational campaign. News media represents the best environment for media advocacy due to advocates' limited funds and the news media's ability to frame the public's perception of issues. In a preparatory stage of a media advocacy campaign, NGOs should identify their objectives and understand and tailor their purpose to a target audience.

Identifying the objectives of your organization

The media advocate should approach the media outlets as somebody who has a valuable product to sell: a good news story.

But not all stories are newsworthy, and sometimes even good stories won't be repeated if they do not become interesting news.

One of the main concerns of an organization is to recognize the stories that can become news and then to find the ways to sell these news.

From the very beginning, the goal of the campaign has to be establish. Also, it is useful for the organization to revise this goal on the way, after the developed messages reached the target.

The questions your organization should answer:

- ☐ Are the goals achievable through the way the issue has been defined
- ☐ Are this goals still appropriate?

Finally when the message was transmitted to the audience and the results are visible, revise the method you used. If something went wrong, how can you define your message better for the next time. Which part was good?

Important: the final goal of a media advocacy campaign is to promote the public policy goals of your organization.

Identifying the audiences

While your organization media advocacy projects develops, you should identify the target groups you wish to reach to. Ask yourself to whom is the media campaign addressed. Is the target the general public or certain individuals in decision making positions? Do you want your message framed in such a way to reach the people who are already on your side or you want to concentrate your attention on the people who didn't reach a decision on the issue but who can be easily persuaded to be on your side?

An effective media advocacy campaign should begin only when the way in which the public policy issue is relation the the values of the public is completely understood; only in this way you can develop the media messages that can increase the public opinion support.

"Framing the issue"

Framing the issue is the process through which the message is developed in such a way that the positive values are underlined while the negative aspects minimized.

Working with the press -- Making it work for you: Media Advocacy Targets and Tactics

All too often, organizations of every kind tend to focus too much on press conferences as a means to reach the press. There are many other ways to get media attention, and often, these avenues -- utilized effectively -- are far more effective.

Purpose

It is rare that major legislative/regulatory change happens without coverage in the press. Unless lawmakers or government officials have their own reasons for wanting to affect change, they will not do so without pressure. Lobbying, letters and meetings are just a few ways of exerting that pressure; another is brought through the press and public opinion.

It is often difficult to make the press pay attention to a certain issue -- reporters have to be educated and then persuaded that the issue matters. This art of public affairs requires good (and correct) information, relationship building with the media, solid pitching, and constant repetition of messages until the goal has been achieved.

NGOs need to know the array of available public relations options that exist to help them reach their advocacy goals.

<u>How</u>

1) Often, direct contact with policy makers is not enough; NGOs need to bring influence through the filter of the media

2) Press attention is an important way to attract grassroots support for an issue.

Good press relations methods are not happenstance. They are driven by the specific needs of the campaign, and the audiences you want to reach. You need to strategically think and plan the course toward those audiences. Obviously, a local radio station talk show has a different listenership than the readership of the European Wall Street Journal. But in a large and difficult advocacy campaign, both audiences would be targeted.

Building relationships with reporters/editors
Editorial Board visits
Deskside visits
Roundtable press briefings
Press conferences
Op-eds (Romanian and international newspapers)
Talk radio
TV newsroom drop-bys
Press releases
Press statements
letters-to-the-editor
Open letters
Advertising
Press kits

Rules for building relationships with the press:

- Do not ever deliberately mislead the press
- Treat reporters with respect even though they might not deserve it
- Correct mistakes through phones calls to reporters or editors
- When possible, don't rely on a verbal interview; do a written statement
- Do not go "on background" unless the reporter is known and trusted
- Remember reporters' deadlines
- Make it easy for the press to cover your issue -- think about the media's needs: other contacts, footage, background material, a local angle, etc.

Using the Media to Promote Your Advocacy Campaign

- Develop professional relationships with the press.
- Develop a list a press contacts, constantly keep the list updated.
- Know what you want to say and how you want to say it.
- Select one or two people from your organization (or the advocacy campaign) to meet with the press and be interviewed. Make sure that those people are well briefed ..this is to insure that the information given to the press is consistent.
- Adjust your media strategy to the medium that you are using:

  *If you are on Television make the event visually interesting.

  *If you are on the radio speak in small segments and mention your organization often.

- Tie your advocacy campaign to other news.
- Personalize the campaign (use real life stories).
- If the press prints incorrect information about your organization, contact them immediately and ask for corrections, incorrect information can damage your campaign and/or your organization's reputation.
- Follow up press releases with phone calls. Make sure your story does not get buried on a journalist's desk.

What you must take into consideration in order to attract the media support:

Localization: making a story local and personal involves community in a special way that general stories rarely can.

Effects of public policy: dramatize the potent local results of pending public policies.

Public policy advocacy can advance the advocate's agenda and create news and generate public debate that frame the organization's cause as a public policy issue and advance it on the public agenda.

Initiating a story: the reporter should know: 1) what the story is ; 2) why the story is significant; 3) identification sources.

Being flexible, spontaneous, opportunistic and creative: media advocacy requires the ability to react quickly and creatively to seize any opportunity in the dynamic news environment.

Seizing the initiative and not being intimidated: successful media advocacy requires confidence and the ability to engage media aggressively.

Staying focused on the issues

Steering the story to the issue frame. The organization's representative should always answer the journalist's questions, even if he/she doesn't agree with the journalist's framing of the story. The organization's representative may suggests other information sources to write the story: spokespersons from other organizations, even those with opposite views.

Following good interview strategies: every organization should anticipate and think through any media event, especially those involving a hostile audience.

Creating news by creating media events: the goal of a media event is to encourage to spread the organization media advocacy message.

Media

Media (Radio, Television, Newspapers, Magazines) can be an important tactic in your advocacy campaign. The use of media is not an advocacy campaign in itself it is only one of the many tactics used to help you win your issue.

There are several ways in which you can use the media:

News Releases:	Let you describe your issue or event.
News Advisories:	Advises journalists on what issues you are working on and invites them to attend an event.
News Conferences:	Explains in depth projects you are working on, and gives reporters the opportunity to ask questions.
Editorial meetings:	Meet with the editors of the media outlet and try to influence their editorial position. If your work has been getting negative (or no) press coverage schedule an editorial meeting to educate the journalists on your issue.
Public Service Announcements:	These serve to educate people on your issue and may also be a way to inspire people to action.
Newsletters:	Use newsletters to communicate in depth about your issue to the general public or your members.
Talk shows:	Try to get on a local talk show so you are able to explain your issue in detail. If you can not get on the talk show call in.
Video:	Make a video about your organization and your campaign to be shown to legislators or at public meetings.

How to Write a Press Release

There are three reasons why you issue a press release:

1) to announce an upcoming event and to invite the press to participate.

2) to issue a statement or take a stand on a news development or issue.

3) to provide background information or to supplement other news.

Neatness counts when writing a press release!

The Content

1. **The lead ...Who, what, where, when ,why**

The first paragraph should answer at least two of the five w's and the second the rest. It helps to have a quotable first paragraph, so pick your priorities carefully. The reporter should immediately learn why your story is newsworthy and should be covered. The lead should "hook" the journalist into wanting to read your story.

2. **The body**..... elaborates on the lead, should include quotes and background information. Quotes give the journalist something to use if he or she is planning to write a story and can not contact your organization.

3. Press release should be to the point.

4. Statements of opinion should always be put in quotation marks and attributed to a person. NEVER EDITORIALIZE (PREACH) IN A PRESS RELEASE.

5. Always include the title or description of the person you are quoting. (Ion Petrescu, President of Save the Earth)

6. Have a standard closing paragraph about your organization, stating the purpose of the organization and the services that it provides.

Example: The For our Children clinic founded in 1990 provides a full range of medical and psychological counselling services for children in Muntenia.

Press Conference

A press conference is appropriate if your organization has an interesting news or must respond quickly and is unable to contact the media representatives one -on-one. You organize a press conference if you are releasing an important document, if a celebrity comes to town or your organization should make a very important announcement.

Planning a press conference

A press advisory including information about "who, what, where and when" of the upcoming event should be mailed or faxed to the most important journalists on your "media list, 5-7 days before the conference. A press release giving full details of the press conference, findings of reporters to be released and excerpts from spokespersons can be mailed as a further reminder of the press.
This detailed press release should be sent two to three days before the press conference.

Contacting the journalists

Two or three days before the press conference you should contact all potential media outlets interested in covering the event, explaining that you are following up on the previous written information. You should fax the advance press advisory and the press release, as a final precaution.

Daybooks and newswires represent an additional source to inform the media about your press conference. Deadlines are usually 3:00 pm the day before your event. Mail, phone or fax your information at least 48 hours before the press conference to the local daybook.

Format

The conference site is important. Make sure there is enough space, sufficient electric outlets for cameras, a standing podium, and enough chairs. The podium should be placed in front of a solid color, preferably blue curtains, and not distracting paintings, mirrors or murals. A press registration table and sign in forms for the reporters should be put outside the room where the press conference will be hold. These preparations should be done 30-45 minutes before the scheduled press conference. "Visuals" are very important: put your organizations's logo under the microphone, to be seen. If you present video tapes, make copies and give them to the TV reporters. A news editor would be more likely to present your event if there is a visual story to tell.

Timing

Press conferences are generally organized between 10:00 am -11:00 am, or between 1:30-3:00 pm. A press conference scheduled before 9:00 am, or after 3:00 pm may be ignored by the media because of the deadlines and start-up times. Limit the conference to 30-45 minute, never over one hour.

Speakers

As a general rule try to limit the number of speakers to three. The opening statements should be short and precise, about three minutes each. The opening statements and remarks should take no more than 10-15 minutes. A moderator should introduce the speakers and coordinate the question part. Double check that your press kit includes a list of names and titles of your speakers so that photographers can take back the list and correctly identify each person.

The order of that the speakers will appear should be established carefully. You should have a complete text of their statements, but ask them also to write an abstract. Journalists who could not attend the press conference, but are interested to write about it, should receive these copies. The possibility of errors or misquotes will decrease by using these texts.
An audio copy of the conference can be offered to the journalists who need more details.

Press kits

Press kits include the most important materials to be distributed to journalists who write about the press conference, or to those who were not able to participate. The press kit should include: statements of press conference speakers on organizational letterhead with address and phone numbers, a description of the policy questions being addressed; additional press contacts on the issue, endorsements from other organizations; updates on legislative initiatives in the area, and a background of the organization(s) sponsoring the press conference. These presentation should not be too long, one or two pages at most.
The press kit can give journalists the background information to cover the story.

Press conference follow-up

Have "a sign-in sheet" for the journalists who attended the press conference. Check the list and identify the media outlets who did not have a representative present. If possible hand deliver the press kit to the most important media representatives who were unable to participate and follow up an hour or so later with a call to specific reporters or editors. Often this type of "checking" can increase the coverage of the event or stimulate an extra story.

Evaluation or "de-briefing"

It is important to analyze the good parts and the bad parts of a press event.
Schedule an evaluation meeting with the decision makers in your organization, to analyze the organization of the event, the way in which the participants reacted to the journalists' questions, the press coverage or the lack of it.
The purpose of the evaluation session is to find out new ways to improve your organization's media contacts in the future.

Press Conference

One week before the press conference

Use a room which is not too large, as to look empty if there are few journalists. Sites may include: hotels, public buildings close to newspaper offices, radio or television stations.

Check on:
Microphone
Podium
Speaker System
Backdrop
Chairs, theater style
Flip charts
Electricity, outlets for TV lights
Table, for materials and media sign up
Ash Trays
Water, for participants

Choose a convenient day and time. Tuesday, Wednesday, or Thursday are best. Schedule the press conference between 10:00 am and 2:00 pm.

Send written announcements by fax, mail or hand deliver to:
Editors
Reporters
Wireservice
Supportive Groups

Prepare written materials including written statements and press kits.

The day before the press conference:

Set up the order of speakers and who will say what
Call all the reporters which are supposed to come and urge their participation
Check up the invitations for the wireservice daybooks
Collate material, make extra copies for the conference follow-up
Check up the conference room and review details
Type up names and titles of spokespersons to be provided to the journalists.

The morning before the conference

Make phone calls to assignment desks and editors
Checkup the conference room several hours before
Discuss the conference agenda with the main speakers

During the press conference:

Have a sign in form for journalists' names and addresses
Provide press kits
Hand out a list of participants
Make opening statements
Arrange personal interviews if necessary.

Follow-up:

Make phone calls to the journalists who did not come but showed an interest
Call journalists who participated to find out if they need more information and help them "to spread" the news.
Monitor and tape local broadcast coverage.
Clip newspaper coverage.
Send these clips to members and founders.

Press kit

- □ Cover memo or press release with contact name and phone
- □ Fact sheets on the issue(s)
- □ History of the issue(s)
- □ Experts' comments
- □ Press clippings
- □ Department by department or city by city analysis
- □ Speeches or statements on the issue(s) (excerpts can be used for op-eds)
- □ Graphs, photographs
- □ Spokesperson's biography
- □ Annual report(s)
- □ Printed copies of speeches or public testimony
- □ One page description of the organization

Interview

- ☐ Don't intentionally misled the press!
- ☐ Be yourself!
- ☐ Stress the positive aspects. Give good news and useful information!
- ☐ Address the reporter in the manner it suits you best, but don't become too friendly.
- ☐ Don't use professional language!
- ☐ It's better to say something interesting several times than something boring several times.
- ☐ Don't attempt to cover too many complex subjects, especially in a TV interview.
- ☐ You're not being interviewed in order to be accused!
- ☐ Don't be scared of not being able to answer a question, but explain why you can't do this.
- ☐ The harder the question, the shorter the answer and the calmer the manner!
- ☐ Never get angry!
- ☐ Don't let the reporter twist your words!
- ☐ Don't give information or opinions that can harm you!
- ☐ Don't legitimate words with a negative meaning by repeating them!
- ☐ You don't have to use the same words as the reporter.
- ☐ Don't let the reporter interrupt you too often.
- ☐ Ask questions to the reporter, too. This represent a change of rhythm and results because most of the reporters like being in the center of attention.
- ☐ After giving the answer to a question or expressing your opinion, don't continue talking.
- ☐ Support your statements with solid proofs

- Use stories, jokes or quotations related to your issue
- Have audio-video materials prepared
- If the material you present in a certain show it isn't yours, state this specifically.
- Don't use notes in a TV show, except for the situation you offer very specific and complex information. Don't read answers or statements previously prepared. Exception: press conferences or official statements.
- Don't let your attention be distracted.
- Treat you partners of conversation with respect, regardless of their behavior. Politely, but firmly use the time you are entitled to.
- It is good to show your feelings, but don't exaggerate.
- Don't be afraid of repeating a very important idea in other words.
- Try to keep your answers and comments very simple.
- Try to have the last word in a radio or TV interview. Don't allow the producer of the show to finish the interview with negative comments about you.
- At the end of a TV show, sit still until you are sure that the interview is over and the microphone doesn't work any more. Don't make any other comments.
- Being in control is not a result of the attempt to control. A natural form of control comes from the confidence and calm that a good preparation and repetition bring.
- Don't misled them! (This is worth repeating!!!)

Advocacy Skills

NGO Resources and Developing a Budget

Keeping track of your Supporters and Allies

Computer Databases: One of the most important uses of your organization's computer is the database. The database allows you to keep track of all your allies and supporters. This is not only valuable in your current advocacy campaign but it is also valuable for future activities of your organization. It is essential that you have a database system that is tailored to your organization. It may require hiring a consultant to help you program the database. One organization found it useful a to record people's attendance at a meeting or event . this information allowed the organization to monitor the most active supporters.

Another organization designed their database as follows:

name	phone calls	fliers	A-list	media	letter writing
Mihala Popescu	X	x	x	x	x

In addition to including her name, address and phone number, this organization included types of volunteer activities in which Ms. Popescu participated. Anytime the organization needed a volunteer to make phone calls, they typed in phone calls and a list of all the volunteers (including Ms. Popescu) who had previously made phone calls appeared.

The *A-list* is the list with your most active volunteers. These are the volunteers that you can count on to participate in most activities. A volunteer on the A-list can be called upon to be a spokesperson for your organization or a can participate in a debate about your issue.

The database can allow you to send out personalized letters. The database can also allow you keep in contact with volunteers on a monthly or bimonthly basis. So, even if you are engaging in an activity that doesn't require many volunteers, the database keep's your members and allies informed and actively participating in the life of your organization.

One of the most important uses of the database is the ***thank you letter***. The database can allow you write personal letters of gratitude to your volunteers for their contribution to a particular activity. A thank you letter will pay off keeping your volunteers active.

<u>Your members and supporters are the strength of your organization, by keeping them informed you keep them committed!</u>

Advocacy Skills: Communicating your message to the public and to your members

In your advocacy campaign you will engage several tactics. You will need to develop specific skills to communicate to your members. allies and the general public. These next few pages provide tips the basic advocacy skills.

- **Telephone calls**

We use telephone calls to members and the general public for a variety of reasons: to invite them to a meeting, to ask them to volunteer (for example to make phone calls), to ask for support, to ask for donations. Here are a few tips in making telephone calls.

- ☐ Set goals for the telephone calls. What do you want to accomplish? Attendance at a meeting?General support of the issue?
- ☐ Who are these phone calls to? Established members? People who signed a petition? People who attended a meeting? This will determine your rap will look like.
- ☐ Determine how many phone calls you want made. Will you need to have volunteers make phone calls?
- ☐ Prepare a "rap sheet" that you and/or your volunteers can read during the phone calls. Here's an example of a telephone rap sheet:

Hello. Mr./ Mrs.__________________________. My name is ___________________I am calling from the green grape growers association. Did you receive our fax regarding our upcoming meeting with the minister of grapes?

If no....I'm sorry, I will send you the fax as soon as we hang up. In the mean time, let me tell you what it concerns......

If yes....As you know we are close to getting Law 52 of 1812 repealed, the law that prohibits the use of green grapes in wine production. In order to insure that we are successful and to show the minister that we have strong support. we are asking that you join us at the meeting on Tuesday April 11 at 11:00 a.m. **Can we count on you to support us by attending the meeting?**

If yes....Great. We will meet at the Green Grape Growers Headquarters at 9:00 a.m. and we will go directly to the minister's office together. Will you be driving or taking the metro? O.k thank you very much we will be in contact with you on Monday to arrange transportation. Thank you again. Goodbye.

If no or undecided...As you know, we are at a crucial moment in our campaign. This meeting could exactly what we need to get the law repealed, are you sure you cannot attend?
If they are busy at that time...I understand that you are busy on Tuesday, can you come to the office on Monday night and help prepare for the meeting? **Thank you! We'll see you Monday night! Goodbye.**

More tips.....

- ☐ Clearly state who you are and why you are calling.
- ☐ If you are calling for attendance at a meeting, mention the date..so there is no confusion.
- ☐ Ask a question which requires the person to say yes or no. For example..Can we count on you to attend this meeting?
- ☐ If the person says yes, they will attend. A good idea is to ask how they will get to the meeting. If he/she is driving than they can pick someone up on the way, if he/she is not driving than you can try to arrange a ride. This way you lock in a commitment from the person. A general rule is that 50% of people who say they will come to an event, will actually come if you arrange a ride for them then they are more likely to be there.
- ☐ If the person says no outright..push a little, personalize it, tell them why it is important for them to attend.
- ☐ If the person is busy or says no ...ask them to do something else.
- ☐ Practice the rap a few times before you actually make a phone call.
- ☐ If you are supervising volunteers, role play the rap a few times. Then give them a few easy calls (guaranteed supporters) at first to help them warm up.
- ☐ Listen to your volunteers very carefully as they make their phone calls. Then suggest ways of improving the calls. People learn best by doing!
- ☐ Sometimes, the most articulate people have trouble making good advocacy telephone calls. If after several tries, they are still having trouble. Skillfully ask them to do do something else in the office.
- ☐ It is usually not a good idea to give a volunteer a list of people to call from their home. They may not make the calls or they may have trouble with the calls and "burn" the names. ("Burning" the list means wasting all the names and phone numbers ...Once a person has been reached and says no it is hard to go back and make them change their minds.)
- ☐ Each caller should have list of names to call, with a column after the names for no's, maybe's, and not home/try later. The caller should keep a separate sheet for all those who say yes. You need a separate sheet for the day before the event when you make reminder calls.

Writing letters to communicate with your membership

Letters are a great way to keep your members and allies updated on your activities during your advocacy campaign. Even if the person to whom you are writing hasn't participated in an event in a long time the letter can serve to keep the person informed and connected to your organization and campaign. Therefore a carefully constructed letter is essential.

Tips on writing letters to your membership or allies:

- Establish goals of the letter. Is the letter inviting the public to a meeting? Is the letter asking for a donation? The letter should always have a goal in addition to information dissemination.

- A letter that you write in an advocacy campaign should never be longer than one page.

- It is (of course) preferable to address each letter individually, instead of addressing the letter to Dear Sir or Madam. If it is too costly or impossible to address each letter individually, try to personalize it in another way; for example; Dear supporter of the environment:.

- If you are able to address each letter individually make sure that you have the correct spelling of the person's name.

- The opening paragraph of the letter should include the purpose of the letter. If you are inviting the person to a meeting, invite them to the meeting in the first paragraph. If officials or experts are attending put them in the first paragraph (it may boost your attendance).

- Put the date, time and the address in bold. Check and double check the address, time and date.

- The body of the letter (or second paragraph) should explain the importance of the event. Use bullets to highlight the important points of your policy instead of writing a long paragraph. People are very busy if you make your letter concise and easy to read, they are more likely to read it.

- The concluding paragraph of the letter should reinforce the time, date and place of the event and should have a few words about your organization.

The Romanian Association of Green Grape Growers is dedicated to the political and economic interests of green grape growers throughout Romanian. The association has had unsurpassed success in promoting the local and international market for Romanian grapes.

Please join us at our next meeting: meeting place
meeting time
meeting date

Sample letter to membership/supporters inviting them to a public meeting

March 28, 1996

Dear Friend of the Green Grape,

Greetings! It is with great anticipation that I invite you to our upcoming meeting with the Minister of Grapes. At this meeting we will ask the Minister to give us his support in favor of amending law 52 of 1812. But we need you at the meeting to show the Minister how important this campaign is to us. Please join us on Tuesday April 11, 1996 at 11:00 a.m. to show the Minister that it is time to put green grapes back into wine production. The meeting will be held at:

The Romanian Green Grape Growers Association Headquarters
Str. Vineyard #36, ap. 4
Bucuresti, Romania
Tuesday, April 11 at 11:00 a.m.

As you know, law 52 of 1812 puts the green grape producers and vintners at great personal risk. The law severely limits the freedom of grape producers to independently choose the type of grape they wish to grow in response to consumer demand and other market forces. Worse, vintners are subjected to fines and even imprisonment for wines produced in violation of the law. In the past six years;

- twelve members of the Association of Green Grape Growers have had their produce confiscated without compensation.
- twenty-two small and medium sized producers of wine have been imprisoned for up to six months and have been subjected fines of 50,000 lei per liter.

This law and its implementation, not only severely violate the human rights of growers and vintners but also threatens the Romanian wine industry. The fastest growing industry according to Tribune Economica. In our free market society, we can no longer tolerate a frivolous and unjust law that unfairly targets the growth and use of green grapes. We must stand together now to stop this antiquated and unjust law. Please join us: the Green Grape Growers Association Headquarters,Str. Vineyard #36, ap. 4, Bucuresti, Romania, Tuesday, April 11 at 11:00 a.m.

Sincerely,

Ms. Marie Murfatlar
President, Romanian Association of Green Grape Growers

Fliers to announce your event

Fliers are tools that are used in advocacy to announce an upcoming event and to invite the general public to participate. Your flier should catch people's attention and tell your story.

Your flier should tell people:

- What the issue is
- What the purpose and goals of the event or meeting are
- When and where the meeting or event is
- If there will be invited guests
- The name and address of your organization and the name of a contact person.

The flier should be on the letterhead of your organization.

Keep your flier simple. Graphics are helpful in getting people's attention. If the event will be confrontational, use ridicule in the flyer directed at your target. Keep in mind that the basic rule of the flier is that it should tell the story of your campaign.

Do not count on your flier to bring people to your event/meeting. The main purposes of the flyer is to remind people of the event/meeting and to educate them on the topic. Even if you have blanketed the country with thousands of fliers, you still need make phone calls to all the people on your database lists. Personal contact is the best way to ensure commitment to your campaign.

For more information see: Basics of Organizing by Shel Trapp, National Training and Information Center

Petitions

As mentioned earlier, petitions are not the best way to reach your target. However, petitions can serve as a recruitment tool for your organization and they can serve to get the message of your campaign to out into the general public.

Tips for writing petitions:

- ☐ The petition should..tell the story of your campaign..Why is this campaign important? How will it effect the signer?

- ☐ Write the petition like a letter. Dear Mr. President....

- ☐ Give the petition a clear and simple title.

- The petition should include the name and address of your organization.

- The petition should be on the letterhead of your organization, with your logo clearly displayed.

- The petition should include a space for the name, address and phone number for the people who will sign the petition. This information is valuable as you set up your membership and allies database.

- If possible one signature per sheet, the signature (and contact information) can come at the bottom of the petition letter. This can serve to give the illusion that you have 10x as many signatures. These petitions can become the symbol of public support.

Tips on petitioning:

- Have a specific time limit for the petitioning period.

- Role play with the volunteers on how to ask for signatures.

- Once the petition period is finished, immediately make a computer database of your newly found supporters.

- Make the petition period fun. Have your volunteers meet at a specific time, go out in pairs and petition. After the allotted time, petitioners should meet back at the office or a restaurant and have a small party. Discuss with the petitioners what went well and what didn't, give pointers for the next time you petition. Give prizes to your volunteers..Who collected the most signatures. Who had the funniest petitioning story. ***Petitioning is a way in which you can develop a team spirit with your volunteers and thereby strengthen your organization, take advantage of it!***

- Have all those collecting signatures wear the same t-shirts or buttons with your organizations logo.

- Petitioners should have leaflets or brochures about your organization with them to give to interested people.

- Never give the petitions to your target(s). The petitions are a symbol of your support and you will need them for future activities. (You also do not want to give your target the name and addresses of all your supporters. They may contact them and try to change their minds.)

- Do "make a public display" of the petitions that you have collected. You can show them off at a public meeting or event, but don't give them up!

ORGANIZERS, TRAINERS AND AUTHORS

Organizers, Trainers and Authors

Constanța Dragne is currently the Finance Officer with Democracy Network Program, Romania

Cătălin Gheorghe is the Deputy Program Officer with the Democracy Network Program, Romania

Mark Parkison is the Director of the Democracy Network Program, Romania

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Adrian Sorescu is the Associate Director at the Pro-Democracy Association

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Randy Willard is the financial Administrator with the Democracy Network Program, Romania

Joelle Ziemian is an expert in Public Relations and Marketing and is a National Forum Foundation AVID volunteer with the Democracy Network Program, Romania for six months.

William O'Brien is the Executive Director and the Lead organizer of the Jeremiah Project, a Congregation Centered Community Organization. He also served as a director of the Metropolitan Detroit Welfare Reform Coalition Michigan

Absorbative capacity

Definition: The ability of the organization to implement a new funded activity without incurring significant additional stresses to its administrative and financial management structure.

Characteristics of an organization which has a strong absorbative capacity:

- □ competent staff are in place to handle procurement and accounting functions. This would generally include a person who handles purchasing, and an adequate number of individuals who manage bookkeeping, reporting and cashiering functions
- □ the organization has successfully managed similar donor funded activities in the past. Indicators of success would include effective implementation within the budget and the schedule, and timely and accurate reporting to the donor.
- □ the organization is currently in compliance with the laws of Romania concerning salary taxes withholding and remittance and all financial reporting to the government
- □ the organization has had, or is able to have, a successful external audit

Budgeting implications to consider

- □ Do we need to hire additional administrative or financial management staff to manage the additional work load? Is the structure of our staffing supportive of efficient administration and good internal control?
- □ Do we need to budget for additional equipment to make our work more productive
- □ Do we need technical assistance or professional legal advice to confirm that our organization is in compliance with Romanian laws?
- □ Do we need to budget for an external audit which will assess our management systems as well as provide assurance to readers of our financial statements?

Absorbative capacity

Definition: The ability of the organization to implement a new funded activity without incurring significant additional stresses to its administrative and financial management structure.

Project Director or
Executive Director

Administrative or
Purchasing Assistant

Receptionist
and cashier

Chief Accountant

Bookkeeper

Project Director or
Executive Director

Bookkeeper/receptionist

Purchasing/
Administration
Cashier

Other donor funded projects -

- ☐ *successfully implemented*
- ☐ *managed the budget properly*
- ☐ *timely and accurate reporting to the donor*

Benefits of an external audit-

- *unbiased, professional feedback on administrative, management, and reporting procedures*
- *audited financial statements which demonstrate to donors, members, and the general public that the organization is transparent and professional*

Compliance with Romanian laws and regulations-

- ☐ *employment taxes are withheld and paid to the government*
- ☐ *proper financial reporting to the government*

Discussion of budget preparation and procedures

In order for an organization to plan for an advocacy, program, or service activity it must evaluate the basic resources required and determine if these resources already exist within the NGO or whether they need to be procured, donated, or found elsewhere. The following categories of resources are generally required to carry out any activity:

- Human resources including staff and/or volunteers: Do you have the staff necessary to carry out the activity? Do they have the appropriate skills? Can you attract and make use of volunteers?
- Space: Are your current offices sufficient to support the activity? Do you require any other types of space?
- Materials and supplies: What kinds of materials and supplies will be necessary? Will you need supplies for media and public relations purposes? Will you be printing and distributing promotional or educational materials?
- Equipment: Do you have the equipment you need including computers? Will it be necessary to procure a photocopier?
- Transportation: How much transportation is needed? Who will be traveling where and how often? What types of transport will be required? Do you need a vehicle?
- Professional fees: Will you need legal advice or other external consultants? Should the costs for external auditors be included?

Recommended Steps in Budget Preparation

1) Clearly define your organization's planned advocacy activities. From the objectives you have selected, identify the specific tactics you will use to achieve the objectives. Decide on the time required for the activity.

2) Estimate the resources required for each tactic. Clearly identify all assumptions made in making your estimates. Be as specific as possible. Which costs can be covered by the organization in the form of a cost share? The remaining costs need to be covered by other sources.

3) Identify the other possible sources of funds. These could be external (foreign) donors, donations from Romanian individuals, companies, or foundations, or funds raised from the sale of services or goods. On a spreadsheet, indicate which source of funds will cover each specific cost.

4) Re-evaluate and correct to make the assumptions and costs as realistic as possible.

5) Get approval for the budget from the Board of Directors.

Use the following broad categories for organizing your costs:

Personnel

Personnel costs include salaries and benefits for staff. Each current position and any anticipated new positions should be listed including the position title and the gross salary (net salary plus income taxes, pension, and unemployment contributions). Employer paid benefits (contributions for social security, health care, and unemployment) should also be listed separately. Any anticipated increases in salaries should be included.

Travel and Transportation

Travel and transportation could include the following expenditure line items-
- airfares, train fares, taxi fares
- per diem (lodging, meals, and incidental expenses)
- reimbursement for personal vehicle use
- official vehicle expenditures including fuel, oil, maintenance, and spares
- vehicle rental
- shipping of project supplies

Travel and transport costs are easily budgeted when you are clear about the amount of travel required. For example, provide the following assumptions to support your calculations:
- number of trips required including who, when, and where.
- rates for various inputs such as hotel costs (per night), meal costs, fuel cost/liter, vehicle rental, airfares, train fares, etc.
- units required such as number of nights, kilometers traveled (for vehicle costs)

Equipment

Equipment usually includes goods with a minimum cost of Lei 200,000 and a useful life of at least one year. As with other parts of the budget, be as specific as possible and it will be much easier to estimate the costs. It is ideal if exact models can be identified such as:
2 computers, 133 mhz processor, 16 mgs RAM, 1 Gigabyte HDD.
1 photocopier, Xerox model 5328, with sorter, and 2 spare drums.

If the equipment is donated, the NGO can legally import the equipment free of customs duty and VAT (see section A8. in volume one of this manual) so this should be taken into consideration when estimating the costs. Estimated costs for software should be included in this category. Be careful to also include the cost of any accessories such as cables or expensive spare parts.

Program or Service Delivery Costs

If program or service delivery costs are a critical part of your planned activity include these costs here. Examples would include:

- Medicines for an NGO which helps children with leukemia
- Family planning supplies for an organization which distributes condoms and other birth control supplies.
- Construction supplies for an organization which is building simple homes for people.
- Food for an organization which feeds the poor.
- Technical assistance materials for an organization which is primarily involved in technical assistance.

Other Direct Costs

All other costs would fall into this category. The list would likely include:

- Office supplies
- Office rent
- Utilities (electricity, water, heat)
- Telephone and fax / e-mail
- Postage
- Office insurance
- Bank charges
- Legal and audit fees
- Equipment maintenance / office maint.
- Newsletter / brochure costs
- Consultants / other professional costs
- Educational materials

Some budgeting tips:

1) Involve all individuals in the budget process who will be responsible for the success of each budgeted activity. You will end up with a much more useful budget because it will be realistic. Also any decisions regarding allocations of resources will be much more acceptable to staff if they understand the budget process, priorities, andexpectations regarding their individual program costs.

2) Assuming you have the software, prepare the budget (and actually any financial tables) using "spreadsheet" programs. The spreadsheet will reduce the chances of mathematical errors and will be much more efficient when you inevitably make numerous revisions.

3) Include a section titled "Notes to the budget" with any budget. It will contain any assumptions and all details to support the individual budget lines. The explanations are sufficient in detail if any reader can pick up the budget and clearly see how all calculations were made.

4) A budget should not be looked at as a trap or harness but rather as a flexible and helpful management tool in looking at program and financing options. In many cases specific budget line items (costs) can be adjusted to ensure a better functioning program.

Proposal budget for NGO Utopia Mare
January - December 1997

Notes to the Budget

Personnel:

1) Project staff will include a project manager (100% involved in project), a public relations officer (100%), an accountant (50%), and a receptionist (33%).
Although the receptionist will be working 33% of the time on this project, her salary and benefits are fully paid by another donor.

2) Salaries are gross, including all employee-paid income taxes, and pension and unemployment fund contributions.

3) The organization's salary related taxes and contributions are as follows, as a percentage of the employee's gross wage:

• social security	23%
• health care	2%
• unemployment	5%
• labor chamber fee	1%
total	31%

4) An average of eight volunteers will be used per month for purposes of materials preparation and distribution. Based on the estimated hours required, the combined value of their efforts is equivalent to one full time person per month at a gross salary of $250.

Travel and Transportation

1) Estimated travel is as follows:

- The project manager and the public relations officer will make two trips each per month to our branches in Cluj, Iasi, and Pitesti, for a total of twelve round trips per month. Each trip to Iasi and Pitesti will require one overnight in a hotel. The organization has lodging provided free of charge in Cluj.

- The accountant will make one trip per month to each branch, also requiring one overnight.

- The project manager will travel to the 3 night, 4 day annual international conference on utopian positive thinking in France, to be held in May.

Proposal budget for NGO Utopia Mare
for the period January 1, 1997 to December 31, 1997

Budget item / cost description	Number of units or number of months	Cost per unit or cost per month	total cost	Amount paid by NGO or other donors	Amount requested from WL
PERSONNEL					
Project manager	12	$500	$6000	$0	$6000
Public relations officer	12	$350	$4200	$0	$4200
Accountant (50%)	12	$200	$2400	$0	$2400
Receptionist (33%)	12	$67	$804	$804	$0
subtotal salaries			$13404	$804	$12600
NGO taxes contrib (31%)			$4155	$249	$3906
Value of volunteers (8)	12	$250	$3000	$3000	$0
TOTAL PERSONNEL			$20559	$4053	$16506
TRAVEL & TRANSPORT					
Staff travel - train	180	$15	$2700	$0	$2700
Staff travel - airfare	1	$500	$500	$0	$500
Staff travel - taxi	360	$3	$1080	$0	$1080
Staff travel - lodging	180	$20	$3900	$1500	$2400
Staff travel - per diem	180	$15	$2900	$200	$2700
Use of NGO vehicle	3000	$0.18	$540	$540	-$0
TOTAL TRAVEL			$11620	$2240	$9380
EQUIPMENT					
Computers	2	$1200	$2400	$0	$2400
Printer	1	$600	$600	$0	$600
Use of photocopier	20000	$0.06	$1200	$1200	-$0
Database & network soft	2	$700	$1400	$1400	$0
Office desks	3	$150	$450	$0	$450
Office chairs	3	$80	$240	$0	$240
TOTAL EQUIPMENT			$6290	$2600	$3690
OTHER DIRECT COSTS					
Office rent	12	$300	$3600	$0	$3600
Utilities (heat, elect, water)	12	$75	$900	$0	$900
Telephone/fax/e-mail	12	$200	$2400	$1200	$1200
Photocopy paper	20000	$0.01	$200	$0	$200
Printing brochures	1000	$1.50	$1500	$0	$1500
Office supplies	12	$75	$900	$0	$900
Media package	500	$2	$1000	$0	$1000
Bank charges	12	$30	$360	$0	$360
Postage	12	$25	$600	$0	$600
Legal and audit fees		$4000	$4000	$1750	$2250
Consultants' fees		$500	$500	$0	$500
Equipment maintenance	12	$50	$600	$0	$600
Office insurance		$250	$250	$0	$250
TOTAL OTHER COSTS			$16810	$2950	$13860
TOTAL PROPOSAL BUDGET			$55279	$11843	$43436

2) Train travel: 15 trips per month for 12 months equals 180 total trips. Average cost for train travel is $15 per trip.

3) Round trip international airfare to France estimated at $500.

4) Taxi estimated at an average of 30 uses per month at an average of $3 each.

5) Lodging estimated at 15 nights per month, 10 requiring a hotel, 5 provided by the organization. Estimated cost per night is $20. For the international confererence 3 nights are required at $100 per night.

6) Per Diem (meals and incidental expenses) is at an average of 2 days required for one overnight trip. 180 trips per year x 2 days per diem each at a rate of $15 per day.
The per diem for the international conference will be provided by the organization, 4 days at $50 per day.

7) The organization's vehicle will be used for project related travel including distribution of educational materials throughout the country. All project related travel will be identified as such in the vehicle log book. The organization will provide the vehicle, fuel, a driver, maintenance, and insurance. The cost share value is estimated to be $ .18 per kilometer and it is estimated that 3000 kilometers will be made during the project.

<u>Equipment</u>

1) Two computers are included in the budget for purposes of correspondence and reporting, e-mail, accounting, and data-base management. The preferred models will include a 133 mhz Pentium processor, 16 mgs RAM, and a 1 Gigabyte HDD, and are estimated to cost $1200 each.

2) A HP model 733 laser jet printer is budgeted for at $600.

3) The organization will make use of its existing photocopier for project related materials. It is estimated that 20,000 project related copies will be made over the life of the project. The estimated cost per copy (excluding paper) is $.06. This value will be provided by the organization. The cost for the paper is included in the Other Direct Costs category below.

4) *Super Quality* Database and network software will be provided by another donor (PHARE) at a value of $700 each.

5) Three new office desks and chairs are budgeted at $150 and $80 each, respectively.

Name of the organization:
The Romanian Association of Green Grape Growers

Mission:
To promote and protect the legitimate political and economic interests of green grape growers throughout Romania

Service Delivery Activities / Priorities

1. To provide information to members relevant to the political and economic conditions for growing green grapes in Romania

2. To interact with the public and authorities in the best interest of the members

3. To increase the market for green grapes through the promotion of all possible uses.

Priority policy issue:
Law 52/1812, the law governing the commercial bottling of wine in Romania, only allows for the use of red grapes in the production of table wines.

Why is this a priority issue? Provide examples of the need for policy change.

The limits imposed by the statute greatly limit the freedom of grape producers to independently choose the type of grape they wish to grow in response to consumer demand and other market forces. Moreover, vintners are subject to fines and imprisonment for wines produced in violation of the law.

Although the law is regularly ignored, the existence of such a legal policy puts the grape producers and the vintners at great personal risk for abusive enforcement of the statute. Since 1989, twelve members of RAGGG have had their produce confiscated without compensation at the point of sale to vintners. Twenty two small and medium sized producers of wine have been imprisoned for terms up to six months and have been subjected to fines at the rate of 50,000 lei per liter for producing wines from green grapes. The law is frivolous and without justification; this situation is a clear violation of basic human rights and the economic freedoms guaranteed in the constitution of Romania.

Organizational Public Policy Goal:
To amend Law 52/1812 to allow for the production of wine from green grapes.

FINANCIAL PLAN FOR EXTERNAL RELATIONS

Goal: To Amend Law 52/1812 to allow for the use of green grapes in the production of Wine

Principle Target: **Parliament**

Secondary Target: **General Public**

Advocacy Strategy: **Informational/Collaborative**

Core Capacity Requirements:

	Currently Exist	Cost	% to project	Cost Share	ınds Requeste
Office Space	Yes	$4,200.00	33%	$2814.00	$1,386.00
External Relations Manager	No	$6,000.00	100%		$6,000.00
Organizational Identity Material	No	$3,000.00	100%		$3,000.00
Logo					
Letterhead					
Envelopes					
Fact Sheets					
Brochures					
Mailers					
Presentation Folders					
Information Systems					
Computer	Yes	$2,000.00	33%	$1340.00	$660.00
Software	Yes	$1,000.00	33%	$670.00	$330.00
Printer	Yes	$1,000.00	33%	$670.00	$330.00
Photocopier	No	$6,000.00	75%	$1500.00	$4,500.00
Telefax	No	$250.00	100%		$250.00
General Public Relations Material	No	$1,000.00	100%		$1,000.00
Relevant Give Aways					
T-Shirts					
Posters					
Pens/Pencils					
Calendars					
Mission Pins/Buttons					
Media Management Kit	Yes	$500.00	100%	$500.00	$0.00
		Core Capacity Requirement Totals:		$7,494.00	$17,456.00

Financial Plan for Advocacy Campaign

Category	Period	Responsible	Source	Cost (USD)	% in project	Confinancing	Sum requested
Objective 1	month 1	Ex. relations	Internal	500	100	50	450
Objective 2	month 2	Dir. exec. Board	Internal	200	100	200	0
Objective 3	month 1-2	Exec.	External	50	100	50	450
Objective 4	month 3	Exec	Internal	1000	100	1000	0
Objective 5	month 3	Vice Pres Ex. Relations	Internal External	4000	100	400	3600
Total necessary for Advocacy Campaign							4500
Total necessary for external relations							17456
Total							21956

FINANCIAL PLAN FOR EXTERNAL RELATIONS

Goal: To Amend Law 52/1812 to allow for the use of green grapes in the production of Wine

Principle Target:	Parliament
Secondary Target:	General Public
Advocacy Strategy:	Informational/Collaborative

IMPLEMENTATION PLAN FOR ADVOCACY CAMPAIGN

Objective 1: Monthly meeting to discuss about the progress of advocacy campaign with 300 members

Tactic 1: Prepare 1000 newsletters about the campaign
Tactic 2: Write and send 300 letters describing the development of the campaign and invite new members to participate in campaign
Tactic 3: Press conferences, letters to editorial boards regarding the campaign

Objective 2: Inform 300 MPs about the necessity to change Law 52/1812

Tactic 1: Prepare and distribute info materials about green grapes to all MPs
Tactic 2: Hold a wine tasting for all MPs
Tactic 3: Lobby on the phone to all MPs asking them to support the change of the law
Tactic 4: Hold meetings with leaders of Parliamentarian Commissions to convince them of the necessity to change the law

Objective 3: Attract another 100 volunteers

Tactic 1: Hold meetings with 50 wine shops owners to discuss the importance of the campaign
Tactic 2: Invite new supporters to get involve in the campaign

Objective 4: Make sure that you have 10 supporters within Parliament for your campaign

Tactic 1: Write amendments to Law 52/1812
Tactic 2: Hold a breakfast meeting for 10 MPs

Objective 5: Develop a poster in 4000 copies for wine shops

Tactic 1: Prepare and print the poster
Tactic 2: Identify important shops and distribute the poster