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ACTIVIST HANDBOOK
INTRODUCTION

Being an activist in your community is exciting work. It means finding a hopeful vision of the future, and working with others to achieve it.

Advocacy - the process of citizens working together to create a change in policy, legislation, or institutions - is not rocket science. Most of us already have the skills we need because we do advocacy every day. Children advocate with their parents for the chance to stay out late on Friday night. Husbands advocate with their wives for the chance to watch Formula rather than fix the plumbing. In these situations, as well as in public advocacy, the only tools we need are communication combined with a bit of strategy. This handbook is designed to help you strengthen those skills you already have so that you are more effective in deciding on your campaign goal and reaching it. Read on and keep speaking up!

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PHASES OF AN ADVOCACY CAMPAIGN

An advocacy campaign is designed to create a change in legislation, policy, or institutions. It has many phases, and these phases overlap. Advocacy is a dynamic process where you take advantage of opportunities as they come up, so often the phases are repeated. Alternatively, in some situations there is no need or no time for certain phases. Use those tools which are appropriate to your situation and goal.

Phase One - Identifying the Goal
- Identify the goal
- Identify possible stakeholders
- Meet with possible partners to determine if have shared interest/goal
- Refine goal
- Initiate research to gather background. What do you need to know? Who has the information? Can you prove it? (be credible and a good resource)

Phase Two - Working with Partners
- Build relationships with potential partners
- Hold joint meetings with supportive partners including associations/groups
• Create core coalition, including core team of 2-5 people who will lead advocacy efforts
• Complete research - draft new program/law which you are recommending
• Develop your message - keep it simple (three points!), think about your audience, allow them to reach a conclusion on their own, present a solution
• Create action plan with a timeline and responsible parties for coordinating key tasks

Phase Three - Broadening Awareness and Building Public Support
• Deliver your message. Consider the medium: who should deliver your message? What is the best way to reach your target audience?
• Repeat your message
• Tailor it to specific audiences
• Use media with positive stories, meetings and public debates, petitions, publications, posters, fliers, meet with legislators
• Continue reaching out to key actors, even if they are not yet supportive
• Expand the coalition. Get organizations to endorse the campaign.

As appropriate, use the following methods:
• Public discussions, meetings, and round tables
• Positive stories in the media
• Petitions and letter-writing campaigns to key supporters
• Public art
• Posters and billboards
• Fliers or articles to hand out on street
• Radio jingles or tv spots

Phase Four - Placing Pressure on Opposition
• Last resort when positive efforts to influence people with authority resist
• Media efforts explicitly naming obstacles
• Legal efforts such as lawsuits drawing on existing local, national, or international law
• Letter writing campaigns targeting key people in authority who oppose the campaign
• Demonstrations

Phase Five - Celebrating and Evaluating
• Celebrate successes, no matter how small. Remember that each conversation builds habits of democracy
• Evaluate what was learned and what could be done better next time
HOW TO...IDENTIFY YOUR GOAL

Not establishing a clear and specific goal is the most common mistake made by activists. On the other hand, clear goals which are connected to a larger vision draw supporters. Dreams motivate you as well as others. Other guidelines for setting goals include:

- Make goals realistic and achievable.
- Set both internal (capacity building) and external goals.
- Set long term and short term goals. Long term goals are what you want to achieve in 1-3 years. Short term goals (usually 6 months to one year) let you set benchmarks to evaluate and celebrate. These short term goals are visible, motivate others who were not interested before, pressure opposition, and increase optimism.
- Ensure your goals are sustainable and have an impact beyond your own campaign. Three ways to do so are: the campaign creates a model which can be replicated elsewhere, the campaign increases support/mobilizes new partners, or the campaign creates legislative change.
- The process of identifying your goal allows you to see potential partners, activities, and opponents.
- Refine your goal based on your research.

Sustainability is an important outcome for advocacy. Making a change that does not last is not very useful or inspiring. Upholding certain values increases the likelihood of sustainability.

**Democracy:** Democracy is about people being involved in decision making. It can happen in an office, a neighborhood, or in government. It is important because it allows people to share their ideas. How often does a president of a company really know how to improve the work of the staff? How committed are staff to a goal if they are not involved in setting the goal? Democracy builds commitment and allows for greater creativity. Practicing democracy in our daily institutions also prepares people to be better able to participate as citizens of their nation.

**Human Capacity:** Every person has the ability to learn, grow, and contribute ideas. As challenging and time consuming as it may be, good leaders always seek ways to learn from people and to create an environment where everyone can learn and contribute.

**Active Citizen:** A citizen is any person who belongs to an organization (work, community, religious group). Being a citizen is not just limited to belonging to a country. As a citizen one has rights, but also responsibilities. This value reminds us that in a democracy the citizens are the solution to our problems.

The following steps help clarify a goal:

- Define the problem clearly.
- Define the opportunity that exists if the problem is solved. Make the opportunity the goal, not solving the problem. People are drawn to positive dreams!
- List the current conditions.
- Describe the ideal.
- Identify ways to measure the differences between the current condition and the ideal.
HOW TO...IDENTIFY STAKEHOLDERS AND PARTNERS

After setting your goal, the next step is to consider who is involved in the issue. Create a list of all people, organizations (preferably listing specific staff), etc. who might be impacted by the problem or opportunity. Include supporters and opponents of your work. This list will change over time, so keep updating it as you learn more.

Ask yourself the following questions:

- Who are all the people who have an interest in the situation?
- Why do they care?
- What are their resources?
- How can you contact them?
- Who has formal power in the situation?
- Who has informal power in the situation?

Then, list their:

<table>
<thead>
<tr>
<th>Name/Organization</th>
<th>Why they care about the problem</th>
<th>What resources they might have to solve the problem</th>
<th>Contact person</th>
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It is often helpful to also list who from the core advocacy team knows the stakeholders or is contacting them.

This list will help you identify allies/friends as well as opponents and fence-sitters (those who have not taken a position on the issue). Your next task will be to choose which allies to work closely with as partners (see coalition building tip sheet). You will also have to educate yourselves on your opponents’ attitudes and plans so that you can respond effectively. Finally, you may decide to convince fence-sitters to join you. In this case, a thorough understanding of their interests and motivations will help you.
HOW TO...MAP POWER
To attain your goal, you have to influence the people who have decisionmaking power on your issue. There are two main types of power: formal and relational.

Formal power is what people in recognized authority have. For example, the executive director usually has more formal power than the assistant director.

Relational power is about who has relationships to people or resources that can impact a problem. For example, a project assistant may know the people involved in a certain community much better than the regional director.

Power mapping strives to draw these different powers to help advocates identify with whom to work.

- Place your goal in the center of a page.
- List the stakeholders all around.
- Draw lines connecting people based on their power (either formal or relational)
- 1 line is a weak amount of influence
- 2 lines are for stronger influence
- 3 lines for when the two parties completely trust each other and work as agreed or where there is absolute authority.
- If necessary, add arrows to show if the power is only going one way, not both.
HOW TO...CONDUCT RESEARCH

Clarifying a goal and identifying the stakeholders also requires more research. Good research is a very powerful tool because you gain knowledge. Knowledge creates one form of power. Accurate research allows you to:

- determine what and how to change policies (who are the specific decision makers and what is their decision making timeframe)
- be a credible voice for change (what is the current situation, who is affected and how)
- become a resource to government, media, and others (what are the possible solutions, what is the data which backs these up)

There are two types of research you will need to do - process research and issue research. To do research, ask yourself two questions. What do we need to know? Then define the question you are researching narrowly so that you only obtain relevant information. Next ask how do we get that information? This information can include data and analysis of the issue, the current legal or policy environment, opinion polls and surveys, and stories around the issue.

**Process Research**

For process research you must know the following:

**Who makes decisions?**
- Know the key actors: BiH politicians, international decision makers, NGOs and citizens, media figures
- Understand the current political structures at all levels (Ministries, Parliaments and local councils, court systems; also international decision makers)
- Understand current political processes - how do legislation and the budget get developed? how do they get passed? how do they get implemented and enforced? what role does the presidency play? what role do OHR and OSCE play?
- Understand current policies in place on issues of concern

**When are decisions made?**
- Understand the timing of the legislative and budgetary processes

**How can citizens affect decision making?**
- Understand the key ways and times to affect policy and legislation

**Issue Research**

For issue research you must know the background of the problem, whom it affects, what its effects are, possible solutions, and what will happen if nothing is done. Research requires finding or creating resources to demonstrate a problem and possible solutions. It could include drafting a new program or rule or law to recommend instead of the current situation.

- Document the sources of all data. This is essential. This way no one can accuse you of making up information.
- If creating new data, work with a neutral
HOW TO...DEVELOP AND DELIVER YOUR MESSAGE

There are two types of message to be developed - your basic, core message which motivates your entire campaign, and the variations of this message which are tailored to the specific audiences which you are trying to reach (such as the general public, a specific segment of the public, elected officials, international donors, etc.).

Developing your Message

The core message is a brief statement that answers the following questions:

- What is the issue?
- Why is it a problem?
- Whom does it affect?
- What is the solution?
- Who can implement the solution?

The tailored message is a brief statement of your core message, but created for a specific audience, based on an analysis of:

- What will be most persuasive for that audience
- What information that audience needs to hear

party to ensure the data collection and analysis are accurate and unbiased.
- Judge whether you believe other people’s or organizations’ data are good before you use them.
- Summarize the data in a short format, no more than two pages. Organize the rest of the information in ways that are easy to understand.
- Find the story within the research. Put a human face on the issue to show why it matters.
- Look for information in existing reports prepared by government, universities, “think tanks”, NGOs, international organizations, investigative journalists.
- Gather your own data through surveys, interviews, focus groups, community gatherings, document research, expert advice.

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- Gather your own data through surveys, interviews, focus groups, community gatherings, document research, expert advice.
• What specific action you want that audience to take. People want to help. The more concrete a suggestion you can give them, the better.

There are a few basic principles of message development.
• Keep it simple (No more than 3 points)
• Present the issue as you see it
• Know your audience (what they already know, their values and beliefs, their feelings, their needs and priorities)
• Present a solution (if possible)

Delivering your Message
• Choose the right medium - Where does your audience get their information and how do we access that source of information? Media include: meetings, newspapers or magazines, internet, billboards, leaflets, letters, radio, television, street theater/public art
• Choose the right messenger - - Who is most persuasive and credible for the audience? Are they skilled for delivering the message?
• Finally, repeat your message over and over.

HOW TO...CREATE AN ACTION PLAN
You've got your goal. You've identified all those with an interest in the issue. You've analyzed these stakeholders for allies, opponents, and fence-sitters. You've decided on whom you'd like to partner with. You've researched how decisions on your issue are made, and you've studied the issue from all sides.

Now it's time to create your action plan.

A good tool is a SWOT analysis. Brainstorm a list of your Strengths, Weaknesses, Opportunities, and Threats. This gives you a picture of the current situation, both internally (your organization's strengths and weaknesses) as well as externally (the opportunities and threats posed by outside actors). A SWOT analysis looks like this:

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td>Opportunities</td>
<td>Threats</td>
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Now that you can see what you have to work with and how, match these lists against your goal to generate a list of next steps. For example, CRS Bosnia is trying to facilitate
Civil society involvement in a World Bank initiative. A strength we've identified is our wide network of grassroots connections, and an opportunity is that World Bank staff in BiH support our efforts. A threat, however, is that the BiH government is not running a transparent process. Our next step, therefore, is to request a meeting with representatives from the government and the World Bank in order to explain why it is in all our interests to pool resources in developing this initiative.

This list of activities will continue to grow as the campaign evolves. Typical action plans look like this:

<table>
<thead>
<tr>
<th>Activity (what?)</th>
<th>Responsible team member (who?)</th>
<th>Resources needed (how?)</th>
<th>Completion date (when?)</th>
<th>Evaluation</th>
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How to... Evaluate your actions

Evaluation of your efforts is crucial to your success. Evaluation should be done not only at the end of a campaign as you consider starting a new one, but also during the campaign to determine whether you need to change tactics.

Demonstrating your success will help you remain motivated and build new partnerships, so consider how and when to boast!

After every activity, ask yourselves the following questions:
- Did the activity directly help achieve our goal?
- Did the activity indirectly help us achieve our goal by generating openings for other activities to build awareness or pressure opposition?
- Did we build our own capacity (increase our knowledge or skills, gain new partners, etc.)?

Public evaluation of your efforts is a strong method for creating trust and accountability with partners and the public. At the end of coalition meetings or public activities, ask the group what went well in the activity and what could have been done better. Use that feedback in designing your next meeting or event. You'll improve your own effectiveness and more people will feel ownership of the process and contribute their efforts.
Building partnerships is key to working with allies, media representatives, and government officials. Identifying shared interests is key to building relationships. Listening well to the other person’s hopes and concerns is key to identifying shared interests. Here are some suggestions for developing your listening skills:

- Develop the desire to listen. Listening to others is a powerful tool. Often, given the opportunity, the other person will tell you everything you need to know.
- Always let the other person do most of the talking. Adopt a 70/30 rule. You listen 70% of the time and you talk 30% of the time.
- Don’t interrupt. There is always the temptation to interrupt so you can tell the other person something you think is vitally important. It isn’t, so don’t. When you are about to speak, ask yourself if it is really necessary.
- Learn active listening. It’s not enough that you’re listening to someone – you want to be sure that they know you’re listening. Active listening is the art of communicating to the other person that you’re hearing their every word.

Once you have learned how to keep yourself from speaking, the art of asking questions is the shortcut to effective listening. Here are some tips for asking questions:

- Ask for clarification if needed. This also lets the other person know you really want to understand their point.
- Read nonverbal messages – body language.
- Ask a question…then be quiet.

- Ask open-ended questions. Questions that can’t be answered with a simple yes or no. “How could we do this?” “What do you think?” Your objective is to get them to talk as much as possible.
- Don’t ask questions that put them on the defensive. For example, “Why?” is intimidating. Don’t ask “why?” Ask “how come?”
- Ask “What if?” What if we did it this way?
- Ask for their advice. What would you suggest we do to resolve this? Everyone loves to be asked for advice.
- Offer alternatives. Which way would you prefer? This demonstrates your respect for the other person.
- Ask about their feelings. How do you feel about this? People love to have their feelings validated.
- Repeat back what they said. Let me be sure I understand what you’re saying. You’re saying that…?” This technique will prevent misunderstandings and convince them that you really are listening.

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Building a coalition takes time, but can be worth the investment. Working with others can give you extra resources and skills which you may not have on your own. It can build your credibility by demonstrating widespread interest in your issue. It can help maintain motivation by providing you with support as well as a way to divide the labor. It can enhance your effectiveness by allowing you to exchange experiences with others.

To build a coalition successfully, keep two things in mind:

- Reach out to unlikely partners: different types of people bring different ideas, solutions, and skills
- Build a shared vision from the beginning, and don't expect others to accept your own. If the vision is too narrow, it will not speak to many people and you could lose the opportunity to have significant numbers of people creating change.

Characteristics of effective coalitions (as noted by the Advocacy Institute):

- Represent large numbers of people
- Represent diverse populations
- Enable an exchange of knowledge and skills
- Responsibility is shared and delegated
- Ground rules are established and respected
- Flexibility is maintained through frequent evaluation and reassessment
- Structure is informal to allow individual organizations to maintain authority
- Decisions are made as a group

Working in coalition with others is a powerful strategy. However, it is also time sensitive and takes commitment and flexibility. Therefore it is important to build coalitions early and find a way to maintain relationships over time. Defining roles and responsibilities at the beginning is an important step. Clearly it is difficult to keep people focused if there is no shared near-term purpose, but even informal conversations on a monthly basis can be sufficient for maintaining open channels of communication.

There are two key cases where working through a coalition may be more difficult. One is where time is of the essence and it is hard to get others involved. That is why having base relationships in place ahead of time is useful. If you cannot wait to engage others, it is critical to keep them informed of your actions. For example, even after a long day, fax them a quick letter telling them of your actions. It is important to try not to surprise allies, because it may make them feel excluded.

The second case is when people in a partnership or coalition may not have the same desired outcome as you. In fact they may want opposing outcomes. In this case, it is also critical to maintain open lines of communication with them if you want to maintain the relationship for the long term. Additionally, all efforts must avoid "demonizing" or attacking your partners and instead stay focused on the issue.
Effective meetings, whether within your organization or involving outside partners, are key to building a successful advocacy campaign. To lead them well, remember the following:

- Set an agenda with specific outcomes
- Send out agenda before meeting
- Select participants carefully
- Keep meetings as short as possible
- Set ground rules when necessary
- Report results from previous meeting
- Have strong facilitator
- Recognize positive people
- Go over assignments - this is the primary way to create accountability. If someone never takes assignments, say so. If someone never completes their assignments, say so.
- Include/engage people
- Evaluate whether agenda was achieved

Core Advocacy Team Meetings (those 2-5 people most involved in the campaign) should also evaluate:

- Is the goal accurate-correct?
- Are we upholding and modeling our values?
- What are we learning?

Before the meeting:

Prepare your Delegation

- Will the official find this group the most persuasive? Does it represent diverse and broad sympathy for your cause? (i.e. pairing business leaders with NGO leaders)
- Are we all agreed on the main points to be expressed?
- Research the person you are going to meet. What is their likely stance on your issue?
Prepare your Presentation

- What is our concise expression of the issue?
- What specifically do we want from this meeting? (further access to information, a vote for a law, a change in policy, a call for an open meeting)
- What are the three main points of the presentation?
  What is our supporting information?
- What issues should not be discussed?
- What is negotiable?
- What can we offer our audience?
- How will we open the meeting?
- What roles will we all take during the meeting? (Who will lead or facilitate? Who will ask which questions?)

During the meeting:

Do’s:
- Be on time.
- Be courteous and positive. Thank them for something - from leadership on an issue you care about to, at a minimum, taking the time to meet with you.
- Be concise.
- Maintain control of the meeting.
- Take notes.
- Listen and identify areas of common agreement.
- Explain the local angle.
- Clarify points of disagreement.
- Ask for a commitment.
- Leave written material on your issue and a contact number.

Don’ts:
- Be argumentative or rude.
- Be intimidated.
- Make up answers if you do not know.
- Discuss too many points or bring up too much information.

After the meeting:
- Debrief with each other after the meeting. What went well? Poorly? What points did the official respond to? Argue against? Did the official mention any other supporters or opponents? Did the official give you the commitment you asked for?
- Share this information with your partners.
- Follow up with a thank you letter or more information. Build this relationship.
HOW TO...WORK WITH MEDIA

Media - whether print, broadcast (TV/radio), or electronic - is your gateway to a wider audience. It can be used to build public awareness about your issue, to generate wider support for your positions, and to pressure decision makers. Do remember, however, that media is not under your control and your message may get changed as it goes out.

There are ways to increase your ability to shape your own message. Getting media coverage is a common problem for activists, and the way to deal with it is the same as you deal with any other coalition building effort. Establishing relationships is key. Be a resource for journalists by providing them with timely, interesting stories and data.

1) First, figure out why you want the media involved. Is it general awareness building about the program? Is it to recruit members? Is it to influence the legislature a certain way?

2) Based on your goal, identify the right form of media. For general awareness building, it may be best to get a 15 second spot on local TV. For membership recruitment, it may be best to have a longer segment on a more conversational program (radio or TV). For influencing legislature, it may be best to get editorials or articles in newspapers.

3) Once you've identified the form of media that is most appropriate, it's important to identify which particular journalist or editor covers those issues. Directing your information to a specific person is much more likely to generate a response than a general request.

4) Once you've identified the person, think about what sort of information they are looking for and why. Do they need to make a certain filing deadline every day or week? If so, make sure that your event or information reaches them in time to make that deadline. Are they responsible for covering certain issues? If so, explain how your event connects to what they are responsible for covering - "spin it" to their viewpoint; if the news is about pressures on how to divide the municipal budget, you could start your announcement with how parents, teachers, and students are volunteering their time to improve their school.

5) Prepare yourself. Clarify purpose of the message. Is it to recruit, educate, change people's behavior, etc.? Write out key points in easily understood language. Never use acronyms.

6) Related to this targeting is the concept of a "hook". Certain events occur which the media knows in advance it has to cover, and is looking for ways to do so: local elections, opening of governmental sessions, first day of school, etc. These larger events can be used as a hook to get the media interested in covering your event. Plan for this by staging press-getting activities around such events.

7) Finally, communication with the media should be kept short and simple. Convey basic info in a few...
sentences and leave a contact number for them to call for more once they're intrigued.

The first contact with media when doing advocacy is to build a relationship. Be prepared to answer the following types of questions:

- What is good about the proposed change? What is the local impact of the proposed new law/program/idea?
- What is the current problem?
- Who cares about this? Who is in the coalition?
- How is media important?
- How can the media's goals be met?

The second meeting is usually to provide more examples and details. Have more stories available about the current problem and how the solution will help. When possible, have information about other models.

For more specific ways to interact with the media, see tip sheets on press releases, interviews, and media events.

HOW TO ...WRITE A PRESS RELEASE

Press releases are a quick way to let media know about an event or an opinion which your organization holds. An effective press release is:

- Short - a few concise paragraphs
- Identified on the top with your logo and organization name
- Titled with an explanation of the information in the release (the editor will choose own title)
- First sentence is date and location
- First paragraph is summary of key information (who, what, where, when, why?)
- Second paragraph is the human aspect, such as a quote
- Third paragraph is other key information
- Have name and phone numbers of contact person
- Optional - have the organization's mission on the release
- FOLLOW UP with the journalists to make sure they got it.

Other tips:

- Read the release out loud to see if it makes sense
- Evaluate success of press releases by seeing if language written was used. Keep a file of clippings of your coverage.
Parents and teachers grade Ministry of Education

Bugojno, Sept. 2, 2006 — Parents and teachers of 3 schools in the Bugojno area graded the performance of the Ministry of Education today, giving high marks for cooperation but low marks for use of modern teaching techniques.

“My daughter is starting secondary school today, and I want to make sure she gets the most out of these next years. My colleagues and I analyzed the performance of the Ministry of Education. We found that they are strong in listening to concerns of parents. However, they need to improve their ability to use modern teaching techniques. My daughter will not learn much if she only listens to dry lectures filled with unnecessary details. She will learn much more if she has to explore ideas with her peers through hands-on science projects, and we want the Ministry of Education to promote such interactive learning techniques” said Mirsad Nalic, a member of the Bugojno Parent-School Council.

Other issues which the Parent-School Councils graded were the quality of classroom equipment and the ways in which resources were allocated. The councils were formed in September 2000 with help from CRS, an American humanitarian organization. Each council consists of 4 parents, 4 teachers, and 2 students, and together work to improve the educational opportunities in their schools.

For more information contact Aida Pivic, Bugojno Parent-School Council spokesperson:

tel: 22 234 456; fax: 22 234 457; email: apivic@bpsc.org

How to ... Conduct a Media Event

Media events can cover a range. Most basic is a press conference on a breaking issue such as a new report with surprising findings, a response to important current events, or an announcement of support for your campaign by a celebrity. The media love images and stories, so events can also be stunts or photo opportunities or street theatre which demonstrate your point of view. Rallies and demonstrations are also frequent media events.

When planning a media event, make it an EVENT!!!

• Pick a special location
• Notify the media 3-7 days in advance
• Schedule the event at a time convenient for journalists. 11:00 a.m. to 3:00 pm are the best hours. Avoid Mondays and Fridays for your events. If you are aiming for coverage on a particular show, have the event at least 2 hours before it airs.
• Prepare a Media Packet with important information for media (press release, background information, etc.)
• Get people there, include other journalists, notable figures, children, etc.
HOW TO...GIVE AN INTERVIEW

Talking to media is like talking to anyone else in your campaign. Prepare your message and repeat it often.

- **Prepare in advance.** What are likely questions and how will you answer? A good way to prepare is to come up with a way to complete this sentence in an interview: "The one thing I would like listeners to understand is...
- **Keep it simple.** Talk in language everyone understands, and don't use technical words.
- **Get immediately to the point.** You won't have much air-time, so make every word count.
- **Be personal and passionate.** People respond to emotions, so show your enthusiasm and concern.
- **Talk slowly and use short sentences.**
- **Don't be aggressive or defensive.** A smile is your best defense. Even on radio you can hear the smile in your voice.
- **Don't use too many statistics or acronyms.**
- **Don't let yourself answer provocative questions.**
- **Remember to breathe.**
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