

# Creating Change Together 1.0

*An advocacy training manual  
for people with and without disabilities.*

Produced by Glenn Ashley and Melinda Haus-Johnson.



Michigan Disability Rights Coalition



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**What is United Cerebral Palsy of Michigan?**

UCP Michigan is a non-profit advocacy organization that works for the productivity, independence, and full citizenship of people with cerebral palsy and other disabilities.

**What is Connections for Community Leadership?**

CCL is a program that supports people with disabilities as they develop leadership skills and become leaders in their communities.

**What is Michigan Disability Rights Coalition?**

MDRC works to build opportunities for people with disabilities so they may live fully integrated lives within their chosen communities, now and in the future.



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Green Mountain Self-Advocates & ARC of Vermont. (2003). Get on board and make a difference. Vermont.

Hines, M. (1987). Don't get mad: Get powerful! A manual for building advocacy skills. Michigan Protection and Advocacy Service, Inc. Lansing, Michigan.

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## Table of Contents

<b>INTRODUCTION.....</b>	<b>1</b>
<b>Purpose of this Manual.....</b>	<b>1</b>
<b>Overview of this Manual .....</b>	<b>1</b>
<b>ADVOCACY .....</b>	<b>5</b>
<b>What is Advocacy?.....</b>	<b>5</b>
<b>Types of Advocacy .....</b>	<b>5</b>
Self-Advocacy.....	5
Advocacy for Others .....	5
Group Advocacy .....	6
Systems Advocacy .....	6
Attitudes about Advocacy.....	10
<b>RIGHTS AND RESPONSIBILITIES.....</b>	<b>15</b>
<b>What are Rights? .....</b>	<b>15</b>
Human Rights .....	15
Legal Rights .....	15
Agency Rights.....	15
<b>What is a Responsibility? .....</b>	<b>16</b>
<b>Rights and Responsibility Activity .....</b>	<b>16</b>
Can rights be taken away? .....	17
<b>Laws that Protect Your Rights.....</b>	<b>17</b>
Section 504 of the Rehabilitation Act of 1973.....	17
Michigan Handicapper's Civil Rights Act .....	17
The Open Meetings Act .....	17
The Americans with Disabilities Act (ADA).....	18
Freedom of Information Act (FOIA) .....	18
Education for All Handicapped Act.....	19
Michigan Mental Health Code.....	19
The Deaf Person's Interpreter Act .....	19
<b>BEING ASSERTIVE.....</b>	<b>23</b>
<b>What is Assertiveness? .....</b>	<b>23</b>
Aggressive: .....	24



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Passive: .....	24
<b>Understanding Assertiveness .....</b>	<b>25</b>
Relationship between self and others.....	25
Listening Behaviors .....	25
Motivations .....	26
Behaviors .....	26
<b>Assertiveness Quiz .....</b>	<b>27</b>
Assertive Responses.....	28
<b>Ways to Become More Assertive .....</b>	<b>29</b>
Assertive Body Language .....	29
Working Towards Assertive Body Language.....	30
<b>Assertive Listening.....</b>	<b>30</b>
<b>Assertive Speaking .....</b>	<b>31</b>
Simple Assertion.....	31
Acknowledgement and Assertion .....	32
Agreement and Assertion.....	32
Repeated Assertion .....	33
<b>ACTION PLANS .....</b>	<b>37</b>
<b>Simple Action Plan.....</b>	<b>37</b>
Step 1: What is the Problem?.....	37
Step 2: What is the Goal?.....	37
Step 3: What is the solution? .....	37
Step 4: What do I need to do?.....	37
Step 5: Do it. ....	37
<b>Developing a Simple Action Plan.....</b>	<b>39</b>
<b>Larger Action Plan .....</b>	<b>41</b>
Step 1: Define the Problem .....	41
Step 2: Define the Goal.....	41
Step 3: Identify Allies .....	42
Step 4: Gather information.....	43
Step 5: Define the barriers .....	43
Step 6: Define the target .....	43
Step 7: Identify possible solutions .....	44
Step 8: Develop action steps .....	44
Step 9: ACTION .....	45
Step 10: Follow-up.....	45
<b>Check List for Choosing a Goal.....</b>	<b>47</b>





<b>Developing a Larger Action Plan .....</b>	<b>49</b>
<b>Example of a Larger Action Plan .....</b>	<b>53</b>
<b>Sample Telephone Record.....</b>	<b>59</b>
<b>Discussion Notes Form .....</b>	<b>61</b>
<b>Additional Information on Action Plans.....</b>	<b>63</b>
<b>NEGOTIATION .....</b>	<b>67</b>
<b>Planning for Negotiation .....</b>	<b>67</b>
Step 1: Decide what you want .....	67
Step 2: Decide what you would be willing to give up to get what you want.....	67
Step 3: Decide on your timeframe for getting what you want.....	68
Step 4: Think about the person you will be negotiating with .....	68
<b>Process of Negotiating.....</b>	<b>68</b>
<b>Tips for Negotiating .....</b>	<b>68</b>
<b>Traps to Watch Out for.....</b>	<b>69</b>
Use of Jargon .....	69
Creating Guilt.....	70
Use of Ultimatums .....	70
Side-Tracking.....	71
Postpone Indefinitely .....	71
<b>Planning for Negotiation Form.....</b>	<b>73</b>
<b>GOVERNMENT .....</b>	<b>77</b>
<b>Federal Government.....</b>	<b>78</b>
Executive Branch (Federal) .....	78
Legislative Branch (Federal).....	79
Judicial Branch.....	80
<b>State Government .....</b>	<b>81</b>
Executive Branch (State) .....	81
Legislative Branch (State).....	81
Judicial Branch (State).....	82
<b>Local Government .....</b>	<b>84</b>
<b>Constituents.....</b>	<b>84</b>
Identifying Your Elected Officials.....	85



<b>Additional Information on the State and Federal Government .....</b>	<b>87</b>
<b>VOTING .....</b>	<b>91</b>
<b>Elections .....</b>	<b>91</b>
<b>Voting Information .....</b>	<b>91</b>
Registering to Vote .....	91
Voting .....	92
<b>TALKING TO PUBLIC OFFICIALS &amp; DECISION MAKERS .....</b>	<b>97</b>
<b>Write Letters .....</b>	<b>97</b>
Materials and Style .....	98
What Goes in the Letter .....	99
Who to Send the Letter to .....	99
Having Someone Write on Your Behalf .....	100
Addressing the Letter .....	105
Practice Exercises .....	106
<b>Letter Writing Campaigns .....</b>	<b>106</b>
Practice Exercise .....	107
<b>Phone Calls .....</b>	<b>107</b>
Calling an Elected Official .....	107
Practice Exercise .....	108
<b>Meet with an Elected Official .....</b>	<b>108</b>
10 Easy Steps to a Successful Legislative Visit .....	109
Practice Exercise .....	110
<b>Public Hearings .....</b>	<b>110</b>
<b>Planning Sheet – Visit with Policy Maker .....</b>	<b>113</b>
<b>SERVING ON BOARDS AND COMMITTEES .....</b>	<b>117</b>
<b>Governing Boards .....</b>	<b>117</b>
<b>Advisory Committee .....</b>	<b>118</b>
<b>Officers .....</b>	<b>118</b>
<b>Board and Committee Meetings .....</b>	<b>118</b>
Agendas .....	119
Being an Effective Member .....	121



<b>Making Meetings Accessible .....</b>	<b>122</b>
It Is True That: .....	122
Your Responsibilities:.....	122
The Responsibilities of the Organization or Group: .....	122
Responsibilities of the Support Person: .....	122
<b>More Information on Serving on Boards and Committees.....</b>	<b>123</b>
<b>RULES TO RUN MEETINGS.....</b>	<b>127</b>
<b>Why Use Robert’s Rules?.....</b>	<b>127</b>
<b>What is a Motion?.....</b>	<b>128</b>
What if I Can’t Remember the Rules? .....	128
<b>Handling a Motion.....</b>	<b>129</b>
The steps for handling a motion are:.....	129
1. Get permission to speak (getting the floor).....	129
2. A member makes a motion. ....	129
3. Another member seconds the motion. ....	129
4. The chair repeats the motion.....	130
5. Discussion or debate by the group. ....	130
6. The chairperson puts the question to a vote.....	131
Examples of how Robert’s Rules Work.....	133
<b>Elections .....</b>	<b>135</b>
<b>More Information on Boards and Committees .....</b>	<b>136</b>
More Information – Rules for Small Boards and Committees .....	136
More Information about Motions.....	136
More Information About Voting.....	137
Bases for Determining a Voting Result .....	137
More Information – How to Debate a Motion .....	138
<b>More Information on Parliamentary Procedures.....</b>	<b>141</b>
<b>TALKING TO THE MEDIA.....</b>	<b>145</b>
<b>Creating a Media Kit .....</b>	<b>145</b>
<b>Presenting Your Message.....</b>	<b>145</b>
<b>Things Reporters Look for.....</b>	<b>146</b>
<b>Reminders .....</b>	<b>146</b>
<b>Tips for Getting the Media’s Attention.....</b>	<b>147</b>



<b>Some Potential Story Ideas .....</b>	<b>147</b>
<b>Compiling a Good Media List.....</b>	<b>147</b>
<b>What to Do When a Reporter Calls .....</b>	<b>148</b>
<b>Things to Remember.....</b>	<b>149</b>
<b>Follow-Up Steps .....</b>	<b>150</b>
<b>Media Advisories.....</b>	<b>150</b>
<b>Press Releases .....</b>	<b>150</b>
<b>Letters to the Editor.....</b>	<b>151</b>
<b>Viewpoint/Opinion Columns.....</b>	<b>152</b>
Examples.....	153
<b>Editorial Board Visits.....</b>	<b>159</b>
Who reads editorial pages? .....	159
Who visits editorial boards?.....	159
How do you get – or at least ask for – an editorial board’s support? .....	159
<b>GET INVOLVED! .....</b>	<b>165</b>



# Introduction

## **Purpose of this Manual**

Leadership is making a difference in your own life and/or in your community. Leadership can come in many different forms and is different for each person. For someone, being a leader may be riding transportation alone for the first time in their life. For someone else, leadership may be sitting on a committee for increasing accessibility of public transportation in their community. What is it for you? Is it deciding where you want to live? Is it meeting with your elected official about a law that is affecting your life? Is it working to make sure your community is accessible to people with disabilities? You are and can be very powerful. You can make a difference and you can be a leader in your life and in your community. It is up to you. All you have to do is make the decision to become a leader.

To be a leader, you need to have self-confidence – to believe that you can make a difference. Advocacy is a tool to develop self-confidence. As you advocate and gain control over your life, you will learn that you have the power to achieve your goals. Often times, we think we do not have the power to change things. As long as we believe we are powerless, we are powerless. When we begin to act as if we know what our rights are and to assert those rights, we will be perceived as powerful and treated with respect.

The purpose of this manual is to help people with disabilities develop advocacy skills to become leaders in their own lives and communities. We hope that as you learn these skills and begin to use them in your own life and community that you will begin to feel the power that you hold. We want you to know that you are proud and powerful!!!

## **Overview of this Manual**

This manual provides information on several topics relating to leadership and advocacy. It provides tools to help increase the success of your advocacy efforts and will also provide resources to help you continue to learn about advocacy and leadership.

The manual covers:

- Advocacy
- Rights and Responsibilities
- Assertiveness
- Action Plans
- Negotiation
- Government
- Voting
- Writing and Talking to Elected Officials
- Governing Boards and Advisory Committees
- Rules to Run Meetings



- Talking to the Media
- Getting Involved

Throughout this manual you will find definitions, tools, and ideas. These can be found by the following symbols:



### **Definitions**

The first time a large or difficult word is used, a definition is provided.



### **Ideas**

Actions you and/or your group can take.



### **Tools**

These are ways that CCL and other agencies can help you or your organization.



### **Forms/Activities**

Things to help you and your group develop leadership and advocacy skills.



### **Snapshots**

At the start of each chapter, we will list what you will learn by reading the chapter (key points).



### **For More Information**

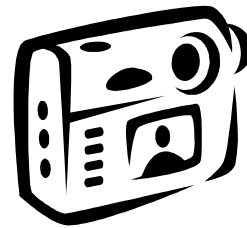
When more information is available, the chapter will include a section with additional resources relating to the topic.



# Chapter 1: Advocacy

## SNAPSHOT

- What advocacy is
- Types of advocacy



This is one chapter of a larger leadership manual called "Creating Change Together."







# Advocacy

## What is Advocacy?



The word **ADVOCATE** means to speak and take actions in favor of a cause or issue.

Advocacy is a type of problem-solving that helps protect the rights of people with disabilities. This includes many problem situations, like problems with Social Security, education, accessibility, housing, employment, residential placement, medical services, transportation, or protection from abuse and neglect.

Most of us have advocated for ourselves or for others at some time in our lives. Thinking about these experiences can help you in several ways:

- You can become more comfortable with the idea of advocacy by realizing you already have some experience.
- You can get more motivated to learn more about advocacy by seeing there are many different ways to use your advocacy skills.
- You can begin to see the ways in which you are good at problem-solving and ways that you may need to get better at problem-solving.

## Types of Advocacy

There are many types of advocacy. We will briefly explain some of the most common types and give an example of each. These different types of advocacy are also displayed in a diagram at the end of this section.

### *Self-Advocacy*

Self-advocacy is speaking out for yourself and standing up for your own rights. It is deciding what is best for you and taking charge of getting it.

Example: You want to be able to ride a regular bus instead of just riding the Dial-a-Ride bus. You work to find someone who can ride with you and train you about the bus routes you will use; where the bus stops are; how to get on the bus and pay the fare; where to sit; and how to signal to get off the bus. This is sometimes called "Travel Training." You may ask to have Travel Training added to your IEP.

### *Advocacy for Others*

This is when you help other people by speaking out for them. It is when you stand up for their rights and help them get what they want. It also means supporting them as they think about what they might want to do.

Example: A friend wants to learn how to ride the bus. You help them ask for Travel Training and get it for themselves.



### ***Group Advocacy***

Group advocacy can be very powerful because it is a group of people who are working together to change something or get something that would help the group.

Example: Several people in the RICC want Travel Training. You go to the transit agency as a group and ask them to set up Travel Training for everyone in the group. At first the transit agency doesn't want to, but the group does not give up until they get what they want.

### ***Systems Advocacy***

Systems advocacy is working to change policies, rules, laws, or systems. The changes made in systems advocacy will help many people instead of just one person.

Example: People in your group find out that bus drivers don't announce the stops. Some group members have missed their bus stop because of this. The law says that drivers have to announce the stops. The group meets with the transit director to talk about the problem, and insists that it gets fixed. Group members keep track of how often the drivers forget to announce the stops. You report to the transit director about how well the drivers are doing. You keep it up until the problem is fixed. And you thank the transit director for getting the change made.

### **Another example of the types of advocacy:**

**Self-Advocacy:** It is getting harder for you to go up and down the steps outside your apartment. You ask the landlord to put in a ramp. The landlord thinks it will cost too much. So you negotiate with the landlord, help her find someone who can put in the ramp, or agree to move to another apartment in the building if the landlord will pay for the moving costs. You get the ramp.

**Advocacy for Others:** Your mother's arthritis is getting worse. She is having trouble getting in and out of her apartment. So you help her talk with her apartment manager. The manager puts in a ramp.

**Group Advocacy:** A developer is going to build new apartments. Your group meets with the developer to discuss Universal Design. You bring in someone from ZeroStep Michigan to explain why the apartments should all be accessible. You negotiate with the developer until he agrees to build readily adaptable apartments with zero steps.

**Systems Advocacy:** With your group and other allies, you ask the city council to adopt a Zero Step ordinance for new apartments in the city. You help them write the law. You work together until the law is passed.



**Now it's your turn.**

Match the following items to the type of advocacy. For each item, put the correct letter in front of the item.

- A. Self-Advocacy
- B. Advocacy for Others
- C. Group Advocacy
- D. Systems Advocacy

- \_\_\_ 1. Your group holds a voter registration drive.
- \_\_\_ 2. You register to vote.
- \_\_\_ 3. You find out that some polling places are not fully accessible. You check out all the polling places in your town. You report the problem to the town council and work with them to get the problems fixed.
- \_\_\_ 4. Your group holds a candidate forum. You ask them questions about the issues that are important to you.
- \_\_\_ 5. You explain absentee voting to a friend. You help them learn how to get the ballot and mail it in.
- \_\_\_ 6. You find out that only 1 person is running for precinct delegate. Four people can be elected. Your group agrees to all write in the group secretary's name on the ballot. She gets 12 votes, and is elected.
- \_\_\_ 7. You find yourself a ride to the polling place.
- \_\_\_ 8. You run for town council to bring attention to accessibility issues in the community, but you don't get elected.
- \_\_\_ 9. You help a friend find out where their polling place is.



### Answers

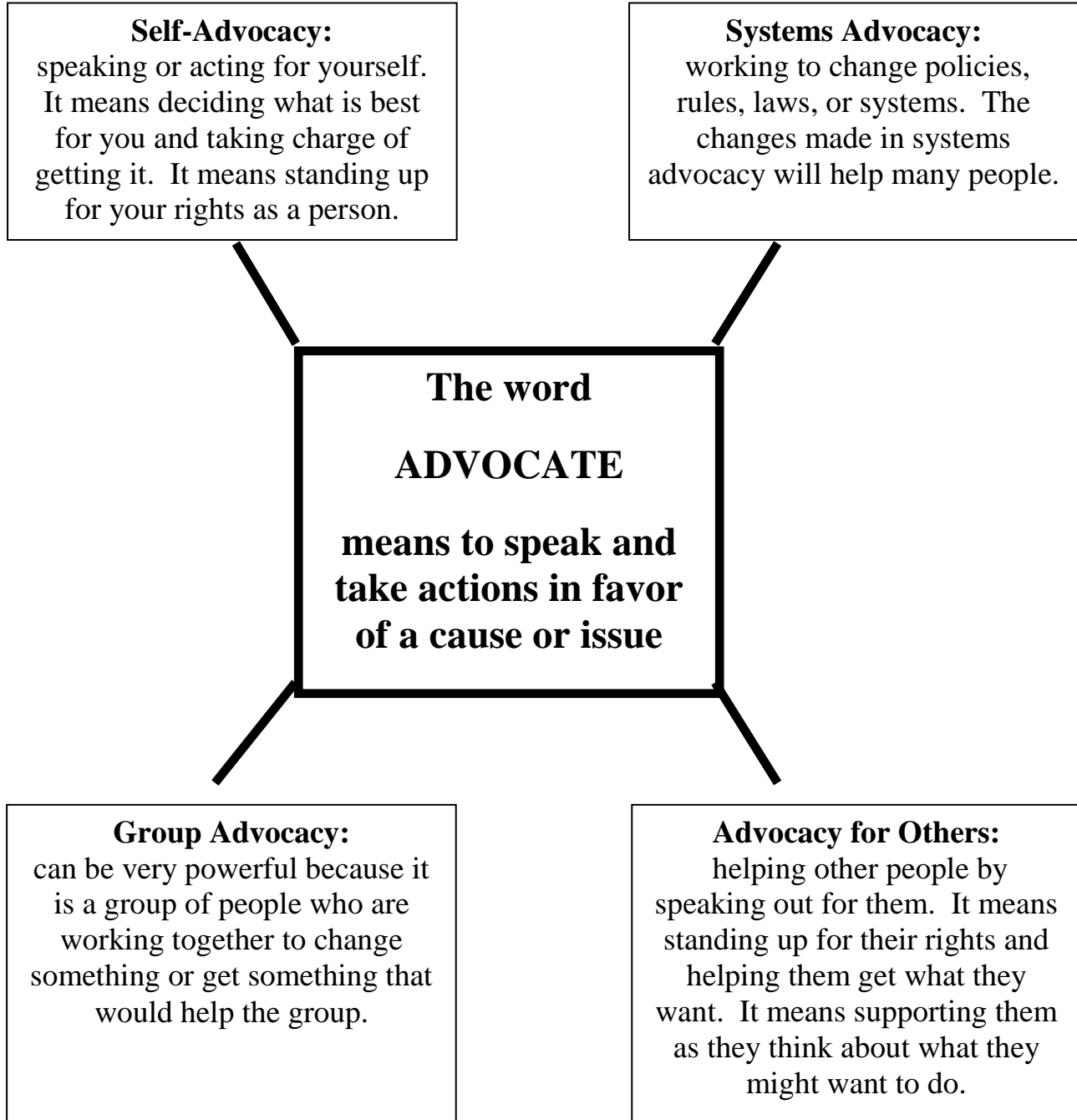
1. C. It is a group taking action together. This could lead to systems change.
2. A. You did it by yourself.
3. D. You are trying to get a change in the system. You want polling places to be accessible. It would also be group advocacy if you have other people helping you get the problem fixed.
4. C. You worked together as a group. You hope that it will lead to systems change.
5. B. You are helping another person advocate for themselves.
6. C. The group is working together to achieve a goal. It can also be systems change advocacy because people with disabilities are now in a position of power.
7. A. You advocated for yourself.
8. D. You are focusing on informing the public about issues of accessibility.
9. B. You assisted someone else in finding their polling place.

Some of the questions may have more than one correct answer. It is more important that you get the concepts than the same answers.



## Types of Advocacy

There are different types of advocacy that people can use to get things that they want.





It can be helpful to think about times when you have advocated. If you are having a hard time thinking of a time in your life when you advocated for yourself, you may want to think carefully about the following questions:

1. Think of at least 2 situations where you advocated for yourself. Here are some examples of times when you might have advocated:
  - Unfair school test score
  - Discrimination when receiving medical care
  - Trying to get a better job
  - Errors in credit card billing
  - Unequal sharing of household tasks (cleaning, taking out the trash)
2. Pick one of your self-advocacy experiences and recall it in as much detail as possible.
3. How did you feel about your advocacy efforts? Are there reasons why you feel this way? What are they?
4. Can you remember the steps you went through in deciding what to do and in actually doing what you planned? How did you feel during this process? Did you want more information or help? Did you feel like you were in control? What worked? What did not work? If you had the chance, what would you change? Did it take a long time? Could the same thing have been done in less time?
5. What things were you good at? What do you want to work on in order to make your advocacy skills better?

### ***Attitudes about Advocacy***

Most of us are brought up to be nice, to be agreeable, and to follow the rules. We are taught that it is bad to disagree, to confront, and to feel angry. People with disabilities have especially been discouraged from being assertive or thinking of themselves as powerful. We are discouraged from “rocking the boat.” However, advocacy requires some “boat rocking.” It involves identifying problems and calling for changes. It often means there will be disagreements and even some anger.

When advocating, we may feel rejection and we may be called names like “complainer” or “troublemaker.” We may even feel like people might come back at us in a bad way if we do not do what they want. It would be easy to say, “do not let this bother you,” but that is easier said than done. Thinking carefully about the following questions may help ease your fears. An advocate does take the risk of being called names and it is natural to have fear about this; however, it is important to keep these fears in check.

Questions to think about include:

- Do you believe that people should have the right to give opinions, to disagree, and to try to change things? If you believe people in general have these rights, do you believe YOU have these rights? If you believe people in general have these rights, but YOU do not, why is this so?



- Do you believe in the things you will advocate for? Do you care about the people you will advocate with and for?
- In the situations you may face, who might not like your advocacy? How many people are involved? How important is it to make these people happy? How hard do these people try to make you happy?
- Are there people or other resources that can help you take the risk of being an advocate?

**Believing that advocacy is a positive thing and that speaking up for yourself, your family, and your community is a positive thing will help you be a good advocate.**



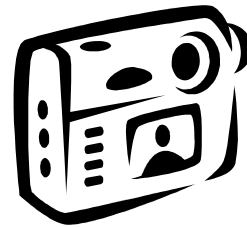




# Chapter 2: Rights and Responsibilities

## SNAPSHOT

- What your rights are
- What responsibilities are
- Laws that protect your rights
- How to keep your rights



This is one chapter of a larger leadership manual called "Creating Change Together."





# Rights and Responsibilities

## What are Rights?

Rights are the rules that help make people equal. You have the same rights under the law as everyone else because you are a person.

There are different kinds of rights. Some rights are yours when you are born, some rights are yours because you live in the United States, and some rights are yours when you get old enough.

### Human Rights

Human rights are rights you have when you are born. They are rights all people have.

#### Examples:

- The right to choose where you wish to live.
- The right to choose the people you wish to be with.
- The right to make up your own mind about what you want to do.
- The right to say “no” when you don’t want to do something.
- The right to change things you don’t like.
- The right to know all of your choices before you make up your mind
- The right to work and live as independently as you are able.

### Legal Rights

Legal rights come from laws.



A **LAW** is a rule that the government says people must follow.

Different laws give you different rights.

- The right to the equal access.
- The right to equal employment.
- The right to equal transportation.
- The right to vote.



To learn more about your legal rights, you can contact Michigan Protection and Advocacy Service, Inc. (MPAS) – (800) 288-5923 (toll-free).

### Agency Rights

Agency rights are legal rights that apply to an agency or organization. Most agency rights are based on a law. All government agencies and most private agencies that provide human services guarantee certain rights to the people they serve. These rights are usually described in a brochure or handbook. They should



also be explained to you (or your parent or guardian) when you begin receiving services. These rights are different at each agency, but almost always include:

- The right to file an application and to have an evaluation of eligibility.
- The right to appeal eligibility and service decisions to an impartial authority.
- The right to have a say in service decisions.
- The right to confidentiality.
- The right to freedom from discrimination.



All government agencies have written procedures for complaints and appeals. You should get a copy of the rights brochures and the procedures for complaints and appeals if you do not already have these materials. You can get these materials by asking your service provider for them.

## KNOW YOUR RIGHTS AND BE RESPONSIBLE FOR THEM!

### What is a Responsibility?



The word **RESPONSIBLE** means to be trusted to make decisions or to finish something.

Responsibilities are the things you must do to get and keep your rights.

- Responsibilities are things others expect us to do.
- Being responsible means being trusted.
- Responsible people know what their rights are and respect the rights of others.
- When using your rights, you must be responsible so that you do not violate the rights of another person.

### Rights and Responsibility Activity



To help you understand your rights and responsibilities, ask yourself the following questions:

- What are some of your rights?
- What are your responsibilities to use and keep these rights?
- What are your rights and responsibilities where you live?
- What are your rights and responsibilities where you work?
- What are your rights and responsibilities if you ride the public bus?
- How can you find out what your rights and responsibilities are? Who can you ask?



**You should always find out what your rights and responsibilities are for everything you do.**

***Can rights be taken away?***

Yes. Sometimes people can limit or take away one of your rights. If someone does this, you have a right to know why.



To find out why, you should ask why your right is being taken away. Keep asking questions until you understand what is happening. Write down the answers you are given or use a tape recorder. Ask as many questions as you can think of and get as much information as you can.



You may also want to call a disability rights organization and talk to someone about what is happening. You can call MPAS at (800) 288-5923 or (517) 487-1755 for more information.

**Laws that Protect Your Rights**

***Section 504 of the Rehabilitation Act of 1973***

Section 504 of the Rehabilitation Act of 1973 says organizations that get money from the United States government cannot discriminate against people with disabilities. For more information, visit <http://www.504idea.org/504resources.html>



The word **DISCRIMINATE** means to treat someone unfairly based on a difference

***Michigan Handicapper's Civil Rights Act***

The Michigan Handicapper's Civil Rights Act is a state of Michigan law that prohibits discrimination against a person because of a disability. The law says that people with disabilities have equal opportunity to obtain employment, places to live and an education, in addition to having access into buildings and facilities to which the general public has access to. This law also requires places to make reasonable accommodations for people with disabilities. For more information, visit <http://ses.cmich.edu/webpage/student-supervisors'-handbook/MI-Dept-of-Civil-Rights-Inquiry-Guide.htm>

***The Open Meetings Act***

This law says public organizations must do almost all their business at open meetings. This includes governments and most public transit agencies. The Open Meetings Act also says that they must put up announcements telling where and



when their meetings will be held. For more information, visit <http://www.legislature.mi.gov/documents/Publications/OpenMtgsFreedom.pdf>

### ***The Americans with Disabilities Act (ADA)***

The Americans with Disabilities Act (ADA) guarantees people with disabilities the same opportunities as other Americans when it comes to:

- Employment
- Using public accommodations
- Transportation
- Access to state and local government programs and services
- Communication

For more information, visit <http://www.usdoj.gov/crt/ada/adahom1.htm>

### ***Freedom of Information Act (FOIA)***

This act gives people the right to look at or copy records of public agencies. This includes governments and most public transit agencies. A public record is any writing prepared, owned, or used by a public body in carrying out its official function. There are some types of records that are not public:

- Employee information
- Information that would keep police or sheriffs from doing their jobs
- Academic records of students

For more information, visit <http://www.usdoj.gov/oip/>



### **Making a Freedom of Information Act Request**

Sometimes it can be helpful to request a copy of a public record. If you want to access a public record, you should write a letter to the agency which has the information or documents you want. Here is a sample letter you can use when you are requesting information under the Freedom of Information Act (FOIA).



### Sample Letter for a Freedom of Information Act Request

Date

Name  
Agency Address

Dear \_\_\_\_\_,

Under the Freedom of Information Act, MCL 15.231, et seq., [or 5 U.S.C Section 552 for federal requests], I am requesting copies of (the document you want).

Thank you in advance for your attention to this matter.

Sincerely,

Your Name  
Address

#### ***Education for All Handicapped Act***

This act provides every child with a disability between the ages of 3 and 21 the right to a free appropriate public education. It includes:

- An appropriate education at public expense
- Individualized program to meet the needs of the student (IEP)
- The education is to be provided in the least restrictive environment

Michigan law expands this right to include people from birth to age 26.

For more information, visit <http://www.scn.org/~bk269/94-142.html>

#### ***Michigan Mental Health Code***

This defines the manner in which services must be provided to people who have mental illness or developmental disabilities. This state law also deals with guardianship. For more information, visit [http://www.legislature.mi.gov/\(S\(z23ad5vqwfv1i1utbbbrcnvf\)\)/mileg.aspx?page=GetMCLDocument&objectname=mcl-Act-258-of-1974](http://www.legislature.mi.gov/(S(z23ad5vqwfv1i1utbbbrcnvf))/mileg.aspx?page=GetMCLDocument&objectname=mcl-Act-258-of-1974)

#### ***The Deaf Person's Interpreter Act***

This guarantees the right to a qualified interpreter for a deaf person if arrested, if taking part in a court proceeding, or if taking part in an administrative appeal or



complaint regarding a government action. For more information, visit  
[http://michigan.gov/dleg/0,1607,7-154-28077\\_28545\\_28558-66364--,00.html](http://michigan.gov/dleg/0,1607,7-154-28077_28545_28558-66364--,00.html)

There are many other laws that protect everyone's rights, such as the Voters Rights Act and the Civil Rights Act.



For more information about laws that protect your rights, contact MPAS at (800) 288-5923 or (517) 487-1755.

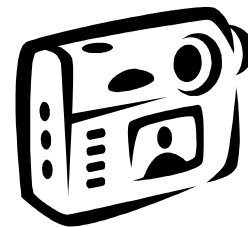




# Chapter 3: Assertiveness

## SNAPSHOT

- What assertiveness is
- How assertiveness is different from being aggressive or passive
- How to be more assertive
- Body language
- How to say what you want
- How to get people to listen to you



This is one chapter of a larger leadership manual called "Creating Change Together."





# Being Assertive

## What is Assertiveness?

Being assertive is a way of getting what you want, while being fair to yourself and fair to others. It is thinking and behaving in ways that let you speak up for your rights while respecting the rights of others.

When you want something from another person, there is more than one way to ask for it. Here are some ways that a seven-year-old might ask for a cell phone:

Begging and whining – Mommy, mommy, can I please, please, please have a cell phone.

Demanding and screaming – Old lady, get me a cell phone, and get it now.

Sit around sadly thinking – I'd like a cell phone, but I won't say anything. I'll just hope Mommy notices.

Polite and reasonable request – Mom, I would like a cell phone. I'd take good care of it. I could call my friends. I could call you when it's time to pick me up after practice so you wouldn't have to wait around for me.

The last way shows respect for both the child and the mother. The child is being assertive. The other ways are immature and do not show respect.

**You will be more likely to get what you want if you act assertively.  
To be a self-advocate or leader, you must be assertive.**

Being assertive is one way to communicate. If people are not assertive, they are usually either passive or aggressive.





Let's take a closer look at assertive, passive and aggressive styles.



**Assertive:**

The assertive person clearly says what he or she is thinking and respects the rights of others.

- Talk about needs clearly and directly.
- Talk about ideas without feeling scared.
- Speak up for what they believe in even if people disagree.
- Know their rights and how to use them.
- Communicate in a way that people understand their point.
- Talk respectfully and professionally to others.
- Take responsibility for their actions.
- Listen to what other people have to say.



**Aggressive:**

Aggressive people say what they think or feel in a way that makes other people feel badly or angry. They are not always good problem solvers since they are quick to blame and attack others.

Aggressive people may:

- Point their finger at people when talking to them.
- Stamp their feet when they are mad.
- Scream or yell when angry.
- Walk one step ahead of others in their group.
- Be very good at the "put-down."
- Answer for other people.
- Cause people to be afraid of them.

An aggressive person is someone who chooses to fight or argue instead of talking calmly about the problem.

If you act aggressively, you will make people feel angry or badly. It will be very hard to get them to give you what you want.



**Passive:**

People who are passive let other people tell them what to do. They say "yes" when they really wanted to say "no." And they do not speak up for themselves or for their rights. They are often so concerned with being liked and accepted that they may never see the need to advocate.

Passive people:

- Often talk with their hands over their mouths.
- Do not look at the person they are talking to.

- Hang their heads or slump while sitting.
- Speak too softly for people to hear them.
- Do not speak up when their rights are violated.

If you are passive, other people will tell you what to do and it will be very hard to get what you want.

## **Understanding Assertiveness**

In this section we will describe several aspects of being assertive and compare being assertive with being passive and aggressive.

### ***Relationship between self and others***



The passive person is very focused on being liked and accepted. However, the passive person usually does not accept him or herself. This person is afraid to speak up for fear of rejection. The passive person avoids conflict that might lead to rejection. Because the passive person gives the power over self-acceptance to others, he or she feels powerless.



The aggressive person focuses on his or her own desires and how others may be used to achieve them. Conflict is used as a tool to gain power over the other person. While the aggressive person usually appears to value her or himself highly, little regard is given to others, their feelings, or rights.



The assertive person values him or herself but also values others. The assertive person does not necessarily like nor desire to be liked by everyone. But she or he does respect others and their rights. The assertive person isn't afraid of conflict, but wants results that are fair to everyone.

### ***Listening Behaviors***



A person who is passive listens to others but does not always hear accurately because he or she often feels too anxious to concentrate. A passive person is unlikely to analyze information in terms of his or her own values because those values become lost in the attempt to win acceptance from others.



The aggressive person may allow others time to speak but usually doesn't listen well. She or he is too preoccupied with her or his own perspective. The aggressive person may also be a poor listener because he or she feels very angry and defensive.



The assertive person is more likely to be a good listener than a passive or aggressive person. The assertive person is able to be more open to information and to be more effective in analyzing and evaluating the value of what he or she hears and sees. The ability to listen, and to gather and analyze information is important for advocacy.



### ***Motivations***



The passive person is motivated mainly by a desire for acceptance and security. Although he or she frequently feels anxious, this person is not likely to take risks.



The aggressive person is motivated by a desire to control and dominate others. She or he often feels angry, insecure, and defensive.



The assertive person has a wider range of motivations and emotional states. He or she may be concerned with self-understanding, developing his or her abilities and with relating to other people. She or he usually is able to exert more control over emotions. This person works for problem solutions that benefit all parties.



### ***Behaviors***

The behaviors of a passive person are usually designed to hide individuality. The individual may actually look and act passively, but could also look and act conventionally – so conventionally she or he is never noticed.



The behaviors of the aggressive person are designed to intimidate and overpower. There's little chance that this person will go unnoticed. "Pushy" is a good description of this person's loud and insistent voice and large gestures.



The assertive person's behaviors are designed to promote communication and problem solving. This person uses a variety of behaviors depending on the situation. In general, the assertive person appears energetic yet relaxed.



## **Assertiveness Quiz**

This is a short quiz to help you get an idea of how assertive you are now. Write down "YES" or "NO" for each question.

1. Do you buy things you do not want because you are afraid to say no to the salesperson?
2. When you do not understand the meaning of a word, do you ask about it?
3. Do you feel responsible when things go wrong, even if it is not your fault?
4. Do you look directly at others when you talk to them?
5. Do people often ask you to speak more loudly in order to be heard?
6. Do you feel intimidated by people in authority?
7. Do you generally have good posture?
8. Do you ever feel so angry you could scream?
9. Do you know how to ask for help without feeling dependent?
10. If someone cuts in front of you in a line, do you usually tell them off?

Next, compare your answers to those on the next page to see if your answer was an assertive answer.



### ***Assertive Responses***

An assertive person would have answered the following:

1. **NO** – The assertive person is not afraid to say no. She or he feels free to make choices.
2. **YES** – The assertive person takes responsibility for getting her or his needs met. Fear of seeming ignorant does not prevent the assertive person from asking questions.
3. **NO** – The assertive person takes responsibility for his or her own behavior. But she or he does not take responsibility for the behavior of others or for situations which are beyond his or her control. Feeling responsible for things beyond your control leads to unnecessary feelings of guilt.
4. **YES** – Direct eye contact is assertive. It suggests sincerity, self-confidence, and the expectation that others will listen.
5. **NO** – An assertive person wants to be heard.
6. **NO** – An assertive person does not allow status to intimidate her or him.
7. **YES** – Good posture communicates a positive self-image. When posture is limited by a disability, good eye contact and facial expression can be used to express a positive self-image.
8. **NO** – The assertive person works to get his or her needs met and does not let situations build to the point of crisis.
9. **YES** – The assertive person is able to ask for help without feeling dependent because she or he maintains a strong sense of self-worth and self-respect.
10. **NO** – Telling someone off is an angry, aggressive response. The assertive person would state that she or he is irritated by the unfairness. He would ask the person to move to the end of the line.



## **Ways to Become More Assertive**

The rest of this chapter gives three ways that will help you become more assertive. These ideas will help you get what you want, while respecting the rights of others.

### ***Assertive Body Language***

Even when you are not talking, your body is saying things about you. People can often tell a lot about you and your feelings by your gestures, facial expressions, posture, and eye contact.



**Gestures** are the way you move your body, your hands, your head, your legs, your arms, and your feet. Gestures can be used to support your message or to distract someone from your message. Nervous fidgeting and tense jerky movements are distracting. These types of gestures make you look out of control and reduce your power. Hand and arm movements can be used to emphasize what you say. It is best to keep your gestures relaxed, smooth, and moderate in size.



**Facial expressions** are the way your face looks when you are talking with someone. For example, smiling, laughing, raising your eyebrows, and closing your eyes are some facial expressions. Our face tells others the degree to which we are alert, interested, in agreement, or relaxed. It also tells them the types of emotions we are feeling.



**Your posture** is how you carry yourself whether you are standing or sitting. Having good posture means you stand or sit with your back straight and your arms rested at your sides. This gives the message that you have confidence, self-control, energy, and that you expect to be taken seriously. Slouching gives the message of “don’t notice me” or “I’m not interested in being here.” A tense posture tells the other person you are in an emotional state and makes you look out of control.



**Eye contact** means that you look straight into people's eyes and face when you are speaking or when they are speaking to you. When you look at someone who is speaking to you, it is a sign that you are interested in listening to the person. Also, when you are talking to someone, looking at the person shows that you are an assertive person.



**Tone of Voice** is how you use your voice when speaking such as how loud you speak. Speaking loudly and slowly enough to be heard and understood helps you get what you want. It is also good to lower the pitch of your voice at the end of a sentence to make it sound like a statement – this strengthens your message.

Since assertiveness can help you get what you want, it is important to have assertive body language.

Remember, a person with assertive body language:

- Stands or sits up straight.



- Looks people in the eye when speaking with them.
- Sits down in a relaxed, businesslike manner.
- Keeps eye contact with people when talking with them.
- Dresses appropriately for the situation.
- Is respectful and pleasant when talking to others.
- Speaks slowly and loud enough to be heard.

### ***Working Towards Assertive Body Language***

Building your assertive body language takes patience. Body language is usually automatic and we are less aware of it. You have to work at better body language. Here are two ideas you can use to build more assertive behaviors:

- To increase your awareness and control, stand/sit in front of a mirror and try to look as passive as you possible can. Slouch, let your chest cave-in, droop your shoulders, and hang your head. Try for a shy facial expression. Now talk to yourself in the mirror. Mumble while talking and try to make everything you say sound like a question. Now work your way gradually into an assertive posture. Straighten up, look yourself directly in the eye, relax your body, and breathe fully. Smile at yourself and try to give a welcoming look at yourself in the mirror. Compliment yourself out loud and then relax your facial expression. Recite your name and address in a calm persuasive tone. Go back and forth between non-assertive and assertive body language several times. Decide that you really like looking and sounding assertive.
- Sit down, close your eyes, and relax. Take several slow deep breaths to relax. When you feel relaxed, picture yourself. Examine your image of yourself. Is your image assertive looking? Change this image to make it look assertive – as assertive as you possibly can. Now imagine you are talking about how assertive you are becoming. Do you sound assertive? Make yourself sound more assertive by speaking calmly, clearly, and with energy. Compliment yourself on how assertive you have become.

### **Assertive Listening**

There are 3 goals of assertive listening:

- 1) To let the other person know that you want to understand his or her point of view.
- 2) To correctly understand what the other person is saying.
- 3) To let the other person know that you understood what they said.

*Note: You can understand what another person is saying and still disagree with them.*

You can let other people know you are interested in hearing what they say and that you understand their point of view in many ways. Here are some examples of how you can tell the other person that you are interested:



- I'd like to hear your views on \_\_\_\_\_.
- I'd like to understand your views on \_\_\_\_\_. Could you tell me about them?
- I'm confused about your view on \_\_\_\_\_. Would you tell me more about how you see the situation?
- I think we are looking at this situation two different ways. How do you see the situation?
- I'd like to hear your thoughts on \_\_\_\_\_.

Looking directly at the other person shows that you are giving her or him your attention. Slightly leaning forward communicates interest. A relaxed, open posture tells them you are listening to what they are saying.

Assertive listening requires you to give your full attention to what the person is saying. This is easier to do when you are relaxed. If you get nervous and are having a hard time listening, excuse yourself for a minute and go to another room. Take a few deep breaths to relax and clear your mind before returning. Ask questions as they come up, especially if the answers are important to understanding what the other person is saying. Saying, "uh huh" and nodding your head slightly will encourage the other person to continue talking.

You can test whether or not you have understood what the other person said by repeating back to them what you thought you heard them say and asking if that is correct. This lets you know whether you understood right and also lets the other person know they have been understood. Here are some examples of ways to find out if you understand what the other person is saying:

- If I understand you correctly, you said \_\_\_\_\_. Is that what you meant?
- I heard you say \_\_\_\_\_. Did I understand you correctly?
- Your view is \_\_\_\_\_. Is that right?

## **Assertive Speaking**

Assertive speaking is way of saying what you want. There are a few different kinds of assertive speaking.



A **SIMPLE ASSERTION** is a clear and simple sentence that says what you want.

### ***Simple Assertion***

A simple assertion is a plain and straightforward sentence. You state an opinion, belief, or request. You do not attempt to explain or justify. Some examples include:



- I would like a copy of the file.
- I would like to speak first.
- I believe your procedure violates state law.
- You did not answer my question.

Simple assertions can be used almost any place at any time. Here are some situations where you might use simple assertions:

- Someone cuts in front of you in line at a store. You say, "Please move to the back of the line."
- You are trying to get a group of people together to eat dinner, but the 5-year-old girl wants to watch TV. You say, "I want you to come to the table now."
- You just asked the special education director when they will implement services in your Individualized Educational Plan. They are already two weeks behind. The director says, "We are working on it." You say, "You did not answer my question."

### ***Acknowledgement and Assertion***



To **ACKNOWLEDGE** means to tell the other person you understood what they said.

With acknowledgement and assertion, you show that you understand the other person's point while still asserting your own needs. This is useful when other people seem to feel you do not understand them or that you are not listening. Acknowledging the feelings and views of other people can help build a relationship and friendly conversation. Here are some examples of the acknowledgement and assertion technique:

- "I understand that you are worried about how your customers will react to seeing a person with a physical disability. But my friend and I have reservations here and we wish to eat lunch here."
- "I can see that you are uncomfortable with our position. But we feel our daughter does not need a guardian at this time."
- "I understand you are worried about how the school district will find therapy services. But I need these services in order to benefit from my educational program."

### ***Agreement and Assertion***

Agreement and assertion is when you agree with the statements made by another person that are true while also continuing to assert your point of view. This shows that you are listening to the person and that you are willing to work with them. However it also allows you to stick to your point. Here is an example:



*Sandra:* I would like to receive training to become a school teacher.

*Vocational Counselor:* It is very hard to get a teaching job. There are already too many teachers.

*Sandra:* I know it will be difficult to get a job teaching. But I know I have a talent for teaching and this is what I want to do.

*Vocational Counselor:* Your disability would make it even harder to compete for a job as a teacher. Have you considered other types of work?

*Sandra:* I realize that my disability will be a factor in getting a job no matter what sort of job I look for. Teaching is what I want to do.

In this example, Sandra agrees with the counselor's statements. By doing so, she showed that she realized that she would face a difficult challenge in seeking a teaching job. She also showed determination and a commitment to meet the challenge.

### ***Repeated Assertion***

Sometimes you have to repeat an assertion many times. This is called repeated assertion. Repeated assertion is useful in at least two types of situations: 1) when you do not get a response to a request, and 2) when the other party tries to change the topic of conversation in order to sidetrack you.

When you do not get a response to a request, you may want to ask again until you get a response.

Example: Allen, who has cerebral palsy, walked into a hamburger shop and sat down at the lunch counter. It was not crowded and the waitress was leaning on the counter chatting with another customer. She looked up from her conversation and stared at Allen for a minute and then returned to her conversation. Allen waited about ten minutes and still the waitress did not come over and take his order. Allen said, "Waitress, I am ready to order now." He got no response. Allen said, "Waitress, I am ready to order now." The waitress continued her conversation. Allen repeated a third time, "Waitress, I am ready to order now." The waitress went up to Allen and took his order.

Sometimes others ignore us hoping we will give up and go away. Allen showed he was unwilling to be ignored by repeating his request until the waitress responded.

A repeated assertion is also useful when the other person tries to shift the topic of conversation or seems to be making the situation more complicated than it needs to be. The example below shows how a repeated assertion can be used in this kind of situation:

*Mrs. Adams:* I want to review my son's educational record.

*Principal:* Those records are very complicated. I don't think you would understand them.



*Mrs. Adams:* I am very interested in reviewing my son's educational record.

*Principal:* I am sure I can answer any questions you have about your son's education.

*Mrs. Adams:* I have a right to see my son's educational records and I would like to do so.

Here, Mrs. Adams did not get into a discussion of whether or not the records were complicated, whether she could understand them, or whether the principal could answer her questions. She stuck to the point and repeated her request to see the records. Mrs. Adams did not use exactly the same words in each of her assertions. This is not necessary. The point of using a repeated assertion is to stick to the point and show that you are not willing to be ignored or sidetracked.

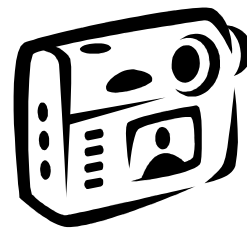
**Becoming more assertive is one of the most valuable skills you will develop. It gives you the means to control your own life. Developing assertiveness takes practice and support from others.**



# Chapter 4: Action Plans

## SNAPSHOT

- Steps to create a plan to get what you want
- How to choose a goal
- How to keep telephone records
- Forms to help you make action plans



This is one chapter of a larger leadership manual called "Creating Change Together."







## Action Plans

When you are advocating, you can increase your chances of getting what you want by making a plan for how you will go about getting it. This is called an action plan. It is simply a problem solving tool – a roadmap to guide you through your advocacy process.



An **ACTION PLAN** is a list of what you want and what you are going to do to get what you want.

### Simple Action Plan

Some action plans can be quick and easy. The simple action plan is used for goals that can be achieved quickly. Simple action plans include 5 basic steps (you can use the Simple Action Plan form on the next page to write your answers down):

#### ***Step 1: What is the Problem?***

Identify what the problem is. What do you not like? What do you want to change?

#### ***Step 2: What is the Goal?***

Identify what your goal is. What do you want? What do you want to change about it?



A **GOAL** is something you want.

#### ***Step 3: What is the solution?***

Think of several ways to solve the problem. Pick the one that you think will work best.

#### ***Step 4: What do I need to do?***

Identify what needs to happen to reach the solution. Who should you talk to? What do you need to do to get what you want?

#### ***Step 5: Do it.***

Do all the things you said in Step 4.





## **Developing a Simple Action Plan**

You can use this form to apply the five steps you just learned to a problem in your life that you want to change. This form can become your action plan.

### ***Step 1: What is the Problem?***

Identify what the problem is. What do you not like? What do you want to change?

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### ***Step 2: What is the Goal?***

Identify what your goal is. What do you want? What do you want to change about it?

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### ***Step 3: What is the solution?***

Think of several ways to solve the problem. Pick the one that you think will work best.

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### ***Step 4: What do I need to do?***

Identify what needs to happen to reach the solution. Who should you talk to? What do you need to do to get what you want?

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### ***Step 5: Do it.***

Do all the things you said in Step 4.





## **Larger Action Plan**

Not all problems are that easy to identify and solve. This next section will talk about creating action plans for larger and more difficult problems. Here are some steps to follow so you can create an action plan. You can use the Larger Action Plan form at the end of this chapter to write out your answers.

### ***Step 1: Define the Problem***

It is helpful to write out a short statement of the problem. This helps you think about what you need to change and can be a helpful reminder if you get stuck or side tracked later in the process. To help you define the problem, ask yourself the following questions:

- How do you know there is a problem?
- How do you feel about the problem?
- Who is affected by the problem?
- When did the problem start? Is it worse at different times?
- What has been done to fix the problem so far? What happened as a result of this? Should this be continued or should we try something else?

Some situations may involve several problems. If so, it is important to list each problem because they may need different advocacy plans. If you have more than one problem, we suggest that you work on the most important problem first.

### ***Step 2: Define the Goal***

It is important to be specific when you are saying what you want. A good rule of thumb is to state your goal in only one sentence. Here are some questions to help you define your goal:

- What do you want?
- What do you want to happen?
- Is your goal something you can get?

If you do not know what your goal is, talk to friends, family members, and other people who know you and your life. They may be able to give you ideas.

It is important to make sure your goal represents the change you really want to make. It is also important to have a goal that is realistic – one that you can accomplish. To help you pick your goal, you want it to meet most of the following criteria:

- **Result in real improvement in people's lives.** If you can see and feel the improvement, then you can be sure that it has actually been gained.
- **Give people a sense of their own power.** People should feel that the victory was won by them, not by the experts.



- **Be worthwhile.** You should feel like you are fighting for something about which you feel good, and which is worth the effort.
- **Be winnable.** You should be able to see from the start that there is a good chance for success, or at least there is a good strategy for getting what you want.
- **Be widely felt.** Many people must feel that this is a real problem and must agree with the solution.
- **Be deeply felt.** People must not only agree, but feel strongly enough to do something about it.
- **Be easy to understand.** Basically, a good issue should not require a lengthy and difficult explanation. It is best when people easily understand that the problem exists, that your solution is good, and that they want to help you solve it.
- **Have a clear target.** The target is the person who can give you what you want. When advocating for a difficult issue, you may need several clear targets.
- **Have a clear time frame that works for you.** Advocating for your goal will have a clear beginning, a middle, and an end. You should have an idea of the approximate dates on which those points will fall. You should also allow time for busy times of the year, holidays, and other parts of the calendar year.
- **Build leadership.** You and the other people advocating with you should be building leadership skills, learning new skills, and building ideas.
- **Set you and/or your organization up for your next action plan.** Think about future issue directions and consider the skills you and/or your group will develop advocating and the contacts it will make for the next action plan you undertake.
- **Raise money.** This means having some idea of how you will get funding sources for your action plan, if needed.
- **Be consistent with your values and vision.** The goals you choose must reflect your values and your vision for an improved society.

We have created a check list at the end of this section that can help you choose your goal.

### ***Step 3: Identify Allies***

Allies are people or organizations that can help you get what you want. They often agree with your goal or what you want. They may be friends and family. They may be people who can support you in making things happen such as policy makers, professionals, and advocates. Here are some questions to help you figure out who your allies are:

- Who agrees with your goal?
- Who will support you?
- Who can you call on when things get hard?

- Who knows a lot of information about your goal?

#### ***Step 4: Gather information***

After you have identified the problem and thought out your goal, you want to gather all the information you need to be able to get what you want. Here are some questions to help you gather information:

- What do you need to learn about the barriers?
- Who can help you solve the problem?
- Who is in charge of the problem you want to solve?
- What laws are involved with this problem?
- What agencies are involved?
- Who should you talk to at the agencies involved?
- What laws, rules, or policies will support what you want?



It may be helpful to make two lists – one with the information you already have and one with the information you still need to get. When listing information you already have, review notes from any conversations you have had about the problem and/or goal. You can also review materials you got in the information gathering stage. When listing the information you still need to get, think about any information that will help show that the goal you want is needed.

#### ***Step 5: Define the barriers***

Barriers are problems that are keeping you from getting what you want. They are things that stand in the way of getting your goal. Here are some questions to help you decide what barriers are keeping you from getting what you want:

- What are the barriers?
- What is stopping you from getting what you want?
- Why are the barriers there?
- Who are the people stopping you from getting what you want?
- What policies are stopping you from getting what you want? Can they be changed?
- What programs are stopping you from getting what you want? Can they be changed?

Sometimes the barriers are people. When this is the case, it is helpful to put yourself in their shoes. Think about what their needs are. What arguments do you expect them to make? You may want to write these arguments on your action plan and think about what you will say or do in response to these arguments. Write down your ideas about how you will respond.

#### ***Step 6: Define the target***

The target is the person who has the power to give you what you are asking for. It is never an institution or elected body. It may seem like it is an organization, but



the target is the person within that organization who has the power to make the change. To help you identify the target, ask yourself:

- Who is the person who has the power to give you what you want?
- What power do you have over them?
- What does this person think about what you want?
- Are they resistant to change? If so, why?

In some cases there are secondary targets. A secondary target is the individual who has power over the person who can give you what you want. When identifying the secondary target, ask yourself:

- Who has power over the person with the power to give you what you want?
- What power do you have over them?
- What does this person think about what you want?
- Are they resistant to change? If so, why?

### ***Step 7: Identify possible solutions***

Solutions are ways that you can solve a problem. Here are some questions to help you think of solutions:

- What are all the ways you can get past the barriers?
- Which solutions are the best choices for you?
- How can you solve the problems that are keeping you from getting what you want?



**NEGOTIATION** is when people talk to each other and agree on something.

It is important to remember that you may not always get exactly what you want. You may have to negotiate (see the section of this manual on negotiation). It is helpful to write down alternative solutions in case you do not get exactly what you want.

### ***Step 8: Develop action steps***

Action steps are specific things you will do to get what you want and to make the solutions happen. This includes a plan for how you will approach the other party and argue your point of view. This may involve telephone calls, writing letters, having meetings, and more. Here are some questions to get you thinking about action steps:

- How can you make the solutions happen?
- Who should you talk to?
- What do you need to do to get what you want?
- Do you know what you need to do?





- Who is the focus of your action steps?

When you are writing down each step, write the date that you want to take each step. These dates are not set in stone, but they can help you keep your sense of purpose and direction. Whenever you are requesting something from another person like a meeting, a copy of a policy, or anything that needs a response from the person, tell them a specific date you want to hear back from them by. Two weeks is a good amount of time to give them.

It is also a good idea to write down any other information, material, or support you will need to complete each step.

Finally, think about what you will do if your plan is not successful. There are almost always other steps you can take to help get what you want.

### ***Step 9: ACTION***

This is when you DO the action steps you identified in Step 8 of this plan.

### ***Step 10: Follow-up***

It is important that you keep track of what is happening with your action plan. You want to know what you have done, what you are waiting on, and what still needs to be done. Here are some ways to do this:

- Keep copies of all the letters you send.
- Keep a record of all the phone calls you make (see sample telephone record).
- Write down when you talk to someone and make notes about the conversation, such as the date you made the call, who you spoke with, what you talked about, etc. (see sample discussion notes form).
- If you write a letter to someone, decide when you think you should expect an answer, and put that date in the letter.
- If you do not get an answer, think about what to do next, and then do it.

Remember the ten steps:

- 1) Define the problem
- 2) Define the goal
- 3) Identify allies
- 4) Gather information
- 5) Define the barriers
- 6) Define the target
- 7) Identify possible solutions
- 8) Develop action steps
- 9) ACTION
- 10) Follow-up





### **Check List for Choosing a Goal**

A good goal is one that matches most of the criteria below. Use this check list to compare goals or develop your own criteria and chart for picking a goal.

<b>Goal 1</b>	<b>Goal 2</b>	<b>Goal 3</b>	<b>Will the issue...</b>
			1. Result in real improvement in people's lives?
			2. Give people a sense of their own power?
			3. Be worthwhile?
			4. Be winnable?
			5. Be widely felt?
			6. Be deeply felt?
			7. Be easy to understand?
			8. Have a clear target?
			9. Have a clear time frame that works for you?
			10. Build leadership?
			11. Set you and/or your group up for your next action plan?
			12. Raise money?
			13. Be consistent with your values and vision?





## **Developing a Larger Action Plan**

You can use this form to apply the eight steps you just learned to a problem in your life that you want to change. This form can become your action plan.

### **Step 1: Define the Problem**

What is the problem?

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Who is affected by the problem?

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When did the problem start?

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---

What has been done about the problem so far? What happened as a result of this?

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### **Step 2: Define the Goal**

*(Refer to the checklist on page 47)*

My goal is:

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### **Step 3: Identify Allies**

Think about all the people who will be involved. Who can help you reach your goal? Who can help you with your solutions? Who are the people in charge of what you want? What agencies can help you? What agencies are in charge of what you want? What are their phone numbers?



People who can help me: \_\_\_\_\_

\_\_\_\_\_

Agencies that can help me: \_\_\_\_\_

\_\_\_\_\_

#### **Step 4: Gather Information**

Information I already know:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Information I need to find out:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

#### **Step 5: Define the Barriers**

The barriers to my goal (the things or people keeping me from getting what I want) are:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

#### **Step 6: Define the Target**

Think about who or what is stopping you from getting what you want. Who has the power to get you what you want?



People who are in charge of what I want:

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Agencies in charge of what I want:

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### **Step 7: Identify Possible Solutions**

The possible solutions are:

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Of these solutions, the best choices are:

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### **Step 8: Develop Action Steps**

Think about what actions you have to take for your goal and/or solutions. What do you have to do to make it happen? Who should you talk to? What agencies should you contact? Should you meet with the people in charge of what you want? When do you want each step to happen?

Actions I will take to achieve my goal and/or the best possible solution are:

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### **Step 9: ACTION**

Do the things you said you would do in Step 8.



## Step 10: Follow-up

Think about what additional actions you might need to take to achieve your goal and/or solutions. Are there people you need to speak to again? Do you need to contact people to make sure they did what they said they would do? Did people respond do you?

Follow-up actions I need to take are:

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## **Example of a Larger Action Plan**

### **Step 1: Define the Problem**

What is the problem?

There is no accessible public transportation that runs on the holidays.

Who is affected by the problem?

Everyone who uses accessible public transportation such as people with disabilities, older adult, etc. Family members of people who ride public transportation are also affected because their family members cannot attend holiday family events. In addition, employers are affected because people needing accessible public transportation cannot get to work on the holidays.

When did the problem start?

The problem started when the public transportation authority decided to stop running the accessible buses on holidays in September of 2005.

What has been done about the problem so far? What happened as a result of this?

Many people have written letters or called the public transportation authority to complain and/or request services on holidays. One or two people have spoke about the issue at a Local Advisory Committee (LAC) meeting.

### **Step 2: Define the Goal**

My goal is:

To work with the public transportation authority to put a policy in place that will make accessible public transportation available on holidays.

### **Step 3: Identify Allies**

Think about all the people who will be involved. Who can help you reach your goal? Who can help you with your solutions? Who are the people in charge of what you want? What agencies can help you? What agencies are in charge of what you want? What are their phone numbers?

People who can help me:

Other people who ride accessible public transportation, all of our friends and family members, any elected officials who I have a relationship with, my boss, my coworkers, my RICC members

Agencies that can help me:

Center for Independent Living, ARC, RICC, other local disability organizations, transportation coalitions, local ADAPT chapter, AARP Chapters, other organizations that work with older adults

### **Step 4: Gather Information**

Information I already know:



People have already tried talking to the local transportation authority and are not getting anywhere. The local transportation authority says they cannot afford to run transportation on the holidays. I know a columnist at the local paper who said he would run an article about the issue.

Information I need to find out:

How many people in my town ride accessible public transportation? How much it will cost to run transportation on the holidays? Who are the people at the public transportation authority who are on my side? Are there any laws that will support me?

### **Step 5: Define the barriers**

The barriers to my goal (the things or people keeping me from getting what I want) are:

Money, the public transportation authority, and the lack of accessible public transportation in my town.

### **Step 6: Define the Target**

Think about who or what is stopping you from getting what you want. Who has the power to get you what you want?

People who are in charge of what I want:

The director of the public transportation authority can approve the policy. This person said he understands our issue, but cannot do anything about it. He is not on our side.

Agencies in charge of what I want:

The Board of Directors of the public transportation authority has power over the director. We have not talked to them about this issue so I am not sure if they agree with me.

### **Step 7: Identify Possible Solutions**

The possible solutions are:

1. Have a bunch of people who support the issue boycott the public transportation system.
2. Get on the Local Advisory Committee.
3. Get a lot of media attention on the issue.
4. Start a letter writing campaign to the director of the public transportation authority.

Of these solutions, the best choices are:

Given the amount of time I have to work on this and knowing my skills, I think the best option is to bring awareness to the issue to broaden support for the issue. I believe, in this case, we should focus on getting media attention and doing a letter writing campaign. This will put pressure on the transportation authority and let them know that a lot of people care about this issue – not just one or two people.

### **Step 8: Develop Action Steps**



Think about what actions you have to take for your goal and/or solutions. What do you have to do to make it happen? Who should you talk to? What agencies should you contact? Should you meet with the people in charge of what you want? When do you want each step to happen?

Actions I will take to achieve my goal and/or the best possible solution are:

1. Create a group of people to work with me on this issue.
2. Write a viewpoint column and send it to the local newspaper.
3. Have all of my group, friends, family members, etc. write letters to the editor of the local newspaper.
4. Write a letter to the director of the transportation authority asking for a specific response by a certain date and send it. Then give copies of this letter to everyone I know asking them to adapt the letter and send it in with their signature.
5. Create and send out a press release about the issue and include a copy of the letter I wrote to the director of the transportation authority.

### **Step 9: ACTION**

Do the things you said you would do in Step 8.

### **Step 10: Follow-up**

Think about what additional actions you might need to take to achieve your goal and/or solutions. Are there people you need to speak to again? Do you need to contact people to make sure they did what they said they would do? Did people respond do you?

Follow-up actions I need to take are:

1. If I did not get a response from the transportation authority by the date I put in my letter, I will call them to follow-up.
2. If the newspaper does not print my article within a week, I will write another one and submit it.
3. I will call all of my friends and family to make sure they sent their letters in like they said they would.





### Developing an Action Plan

Steps to Take	Who Will Do It	What Information Do I Need	When Should Each Step Be Done by	How and When Will I Follow-Up





## **Sample Telephone Record**

Here is a form you can use to keep track of the phone calls and people you talk to.

<b>Date</b>	<b>Name of Person Talked To</b>	<b>What We Talked About</b>
_____	_____	_____ _____ _____
_____	_____	_____ _____ _____
_____	_____	_____ _____ _____
_____	_____	_____ _____ _____
_____	_____	_____ _____ _____
_____	_____	_____ _____ _____
_____	_____	_____ _____ _____
_____	_____	_____ _____ _____
_____	_____	_____ _____ _____
_____	_____	_____ _____ _____







## Discussion Notes Form

Here is a form you can use to keep track of the people you talk to and what you talked about.

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

Kind of discussion (telephone, meeting, other): \_\_\_\_\_

Discussion with:

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

Title: \_\_\_\_\_

Agency: \_\_\_\_\_

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

Telephone: \_\_\_\_\_

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

Reason for Discussion: \_\_\_\_\_

\_\_\_\_\_

Summary: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Agreements/Conclusions: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Follow-Up Needed: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

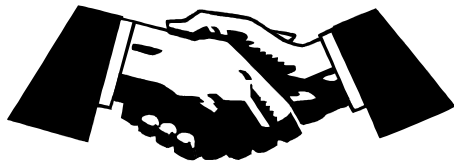




## **Additional Information on Action Plans**

Kendall, J., Bobo, K., & Max, S. (1991). Organizing for social change: A manual for activists in the 1990s. Midwest Academy. Seven Locks Press. Washington.

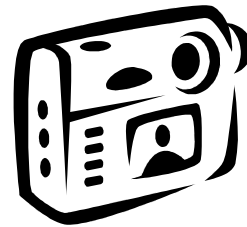




# Chapter 5: Negotiation

## SNAPSHOT

- What negotiation is
- How to talk with people to get what you want



This is one chapter of a larger leadership manual called "Creating Change Together."





# Negotiation

A negotiation happens when two or more people want different things and they talk to each other and reach an agreement.



**NEGOTIATION** is when people talk to each other and agree on something.

People negotiate everyday in many different ways. Here are some examples:

- Talking with your friend and deciding where to eat lunch.
- Talking with a car salesperson about getting a car for a cheaper price.
- Talking with Community Mental Health staff about a service you want.

Being able to negotiate helps you get things you want. If you learn to negotiate you can:

- Solve problems effectively
- Get more things that you want
- Be a valuable member of a group or organization

## **Planning for Negotiation**

It is important to be prepared before you meet with someone you want to negotiate with. The more prepared you are, the more likely you will be able to get what you want. There are some steps you can take to make sure you are ready to meet with someone.

### ***Step 1: Decide what you want***

Spend some time thinking and then decide what it is you want.

- You should develop an action plan if you have not already done this (refer to the Action Plan section of this manual).
- What is your goal?
- What do you want the person you will be meeting with to give you?

### ***Step 2: Decide what you would be willing to give up to get what you want***

**REMEMBER:** You may have to give something up to get what you want. Think before you meet to decide:

- What is it that you need?
- What are you willing to give up to get what you want?
- What is the absolute bottom line that you will settle for?



### ***Step 3: Decide on your timeframe for getting what you want***

REMEMBER: You may not always get what you want right away. You may have to be flexible in the amount of time it takes to get what you want.

- What is your time table for getting what you want?
- What is the last day you will wait for what you want?

### ***Step 4: Think about the person you will be negotiating with***

Think about the person you are about to meet with and ask yourself:

- What will the person you are meeting with want?
- What will the person you are meeting with be willing to give up?

**Planning before you meet will help you be confident and assertive.**

## **Process of Negotiating**

Here are some steps you can use to make negotiating easier when you arrive at the meeting:

**Step 1:** Say what you want and why you want it.

**Step 2:** Ask the person if she or he will give you what you want.

- If the person says “yes,” ask the person when you will be able to get what you want.
- If the person says “no,” ask them to tell you why.

**Step 3:** Ask the person what solution/solutions he or she has to help you get what you want.

**Step 4:** Listen to what the solution/solutions are that the person suggests. If you like one or some of the solutions, let the person know you agree with the solution/solutions. Find out what the timelines are for the solution/solutions to happen.

**Step 5:** If you do not like what solution/solutions the person offers, you should have your alternative solution/solutions ready to tell the person about.

- If the person agrees with your alternative solution/solutions, ask when you will be able to get what you want and what your responsibilities are for getting what you want.
- If the person does not agree with your alternative solution/solutions, go back to step 3, step 4, and step 5.

## **Tips for Negotiating**

Here are a few tips for when you are negotiating with others:





- Always go to the meeting prepared and organized. Have all the information you think you will need with you.
- Try to meet with the person in a place that you feel comfortable. You do not have to meet in an office. You can meet at your home, in a restaurant, or anywhere that makes you feel comfortable.
- Find out who will be at the meeting ahead of time. This will help you develop your negotiation plan.
- Try to set up the meeting with the person who has control over what you want so you can get answers at the meeting. If you meet with someone who works for the person who controls what you want, you probably will not get any answers the day of the meeting. You may not always be able to meet directly with the person who controls what you want.
- If you are the one who has asked for the meeting, you should prepare a list of the things you would like to talk about. List them in the order you want to talk about them.
- If you did not set up the meeting, ask the person who set it up to give you a list of what will be talked about before the meeting. You will need this information to prepare.
- If something that you wanted to talk about is not included on the list, call the person in charge of the meeting. Ask the person to add your concern to the list.
- Bring a tape recorder, or take good notes, so that you will remember what happened at the meeting. This will help you to remember what the timelines are for getting what you want or what the reasons are why the person will not give you what you want.
- Take someone you trust to the meeting with you. Having someone with you can help you feel more comfortable. The person with you can take notes for you.

### Traps to Watch Out for

There are several things that are commonly used by service providers and administrators because they are very good at throwing advocates off track. Just being aware of these things will better prepare you to handle them if they are used.

#### *Use of Jargon*

It is common for professionals to use jargon. By this we mean technical terms, specialized words, or abbreviations that are not likely to be used in everyday conversation of the average person. In negotiations, professionals may use a lot of jargon to try to make advocates feel stupid, to keep them out of the conversation, or to diminish their credibility.



**JARGON** means big words or abbreviations that the average person does not use.



You should NOT pretend that you understand the jargon. Ask them to tell you what the terms mean. Ask them to stop using abbreviations that you do not know. It is unfair to expect the average person to understand jargon. Do not allow yourself to feel less smart just because you are not familiar with certain types of jargon.

It is also important to learn to say “I don’t know” comfortably. You should not be expected to know everything, although at times you may be asked questions you are not expected to know the answers to in order to throw you off guard.

*Creating Guilt*



**GUILT** is feeling bad as if you did something wrong.

If you are starting to feel it is your fault that the problem exists in the first place, you are getting caught in a guilt trap. If the other party is able to make you feel responsible for the problem, she or he is getting ready to convince you that you, and you alone, are responsible for the solution.

Hopefully you know your rights and responsibilities and also know the rights and responsibilities of the person you are negotiating with. Suggestions that you are a bad person are uncalled for and you should say so.

*Use of Ultimatums*

The use of ultimatums is not good. Don’t do it. An ultimatum is the use of an uncompromising, “take-it-or-leave-it” position. It is likely to cut off valuable options and will definitely make you appear unreasonable. Skilled advocates and negotiators do not use ultimatums.



An **ULTIMATUM** is a threatening statement that implies it is all or nothing – there is only one choice.

If the person you are negotiating with uses an ultimatum, question them about it. Ask what options and alternatives were considered before deciding upon their position. Suggest that perhaps not all options were considered. Suggest that there may be additional positions to consider. Ask if there are any exceptions to the ultimatum. Try to think of examples where they would be likely to make exceptions to the ultimatum. Your goal in asking questions is to show that you are unwilling to accept a “take-it-or-leave-it” offer and you want to explore additional alternatives. Furthermore, you want to joggle the other person’s thinking so that they also are willing to look at possibilities beyond the ultimatum they have issued.



## ***Side-Tracking***

Many times, the person you are negotiating with may try to side-track you from the issue. One way they may try to do that is by asking you to serve on a committee. If they ask you to be on a committee, it's a good idea to check out the structure and power of the committee.

Questions about the committee structure:

- How long has the committee been working on this?
- When will the committee's work be completed?
- Where and when does the committee meet? How often?
- How many people are on the committee?

It is even more important to find out how much power the committee has. Find out:

- What is the charge of the committee? This means, what is the committee supposed to do and how will they do it?
- Does the committee have decision-making authority? Can the committee take action or just make recommendations?
- Who do they make recommendations to? Do the people they make recommendations to have any authority to act?
- Does the committee fall under the Open Meetings Act?
- Are the real decisions made somewhere other than the committee meetings? (You can't ask this question out loud. You just have to try and figure out the answer.)
- Is there anyone on the committee who has decision-making power within the organization? Who is that person?
- If no one on the committee from the organization has the power to do what the committee says, then the committee's work is likely to go nowhere. At best the committee will have to report to someone who has not been on the committee, who will have to be brought up to speed and may or may not understand at all why the committee gave the recommendations they did. The committee may have no influence whatsoever.



Sometimes it's a good idea to give yourself some time to think about whether you want to be on the committee. You could tell them that you need to check with your supervisor or with a family member to see whether that will fit into your schedule. You may want to attend a meeting before you decide.

## ***Postpone Indefinitely***

Another common response from people you are negotiating with may be "We are working on it." With this response, many times it is the person's way of postponing having to deal with the issue.

When they say "We're working on it." ask:

- Who is working on it?



- Do they have authority to make a decision?
- When do you expect to have the work completed?
- Who will get back to me on it?
- How soon should I check back with you about this?
- Who can I contact if I have questions about the progress? How is best to contact them?
- If there isn't a report back date, or there isn't a person responsible to contact, then don't buy it!



Communication and negotiation in meetings is difficult. We suggest that you build your own skills by attending meetings with other advocates and just watching how they communicate and negotiate. You can also practice these types of conversations with friends and family.



### **Planning for Negotiation Form**

This form will help you prepare for negotiating. Using this negotiation plan and an action plan will help you be ready for your meeting and to get what you want.

My goal is: \_\_\_\_\_

I would be willing to give up this part of what I want:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I am not willing to give up this part of what I want:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The person I am negotiating with may want these things:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The person I am negotiating with might give up this part of what he or she wants:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

The person I am negotiating with may not be willing to give up this part of what she or he wants:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you are able to get part or all of what you want, by when do you want it?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

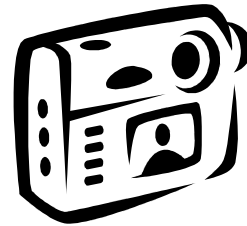




# Chapter 6: Government

## SNAPSHOT

- How the government works
- The different levels of government
- How to identify your elected officials



This is one chapter of a larger leadership manual called "Creating Change Together."





# Government



**OUR GOVERNMENT** is a group of people who manage and direct what happens in our country, state, and city/town. They are people who represent us.

Government affects our lives in many ways. Two of them are especially important for advocacy. The government passes laws. And the government makes budgets by levying taxes and approving spending. Advocates must make sure that the government understands how laws and funding affect the daily lives of people with disabilities.

In order to do this, we have to know something about how government works. We have to know who makes which decisions. Then we can talk to the people who can take the action we need on an issue.

There are three major government divisions: the federal government, the state government and the local government.



## Federal Government

The federal government manages and directs what happens in our country, the United States of America.



## State Government

The state government manages and directs what happens in our state, Michigan.



## Local Government

The local government manages and directs what happens in each town or city in Michigan.



## Federal Government

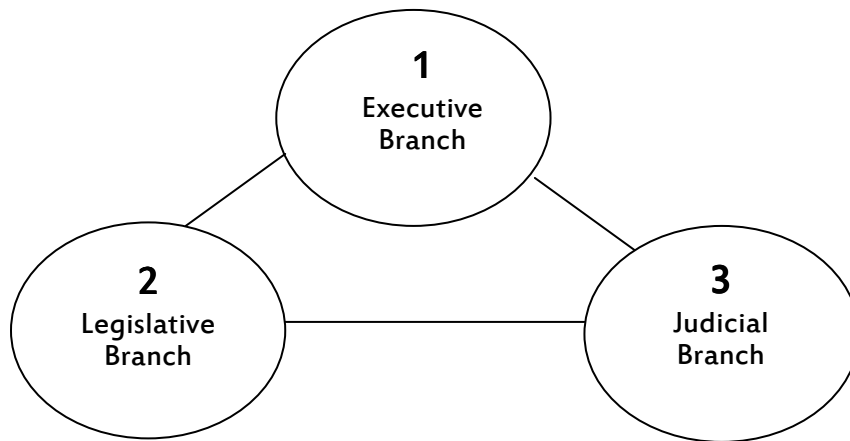


The federal government is made up of the people who manage and direct what happens in the United States. The people who work in the federal government make laws and rules that every state and the people who live in every state must follow.



A **LAW** is a rule that the government says people must follow.

Federal government is divided into three branches:



### ***Executive Branch (Federal)***

The people in the executive branch make sure people are obeying the laws.

The **President of the United States** runs the executive branch of the federal government.

The President is:

- The **Commander in Chief** of the United States Armed Forces: all decisions about the Army, Navy, Air Force, and Marines are the President's responsibility.
- The **Chief Executive**: decides how to make sure people obey laws and that all people who work for the executive branch are doing their jobs.
- The **Chief of State**: The President represents the United States when he or she talks to and works with leaders of other countries.
- The **Chief Legislator**: The President can say "yes" or "no" to laws that the legislative branch makes.





### **Legislative Branch (Federal)**

The legislative branch is the part of the federal government that writes and makes laws that every state must follow. The legislative branch in the federal government is called **Congress**. The legislative branch is divided into two groups, called **houses**. The groups are the **Senate** and the **House of Representatives**. Both the Senate and the House of Representatives are made up of people from every state in the United States.



<b>U.S. House of Representatives</b>	
⇒ There are 435 Representatives. Each state has a different number of people in the U.S. House of Representatives.	
⇒ We decide who the Michigan Representatives will be by voting. They speak on behalf of the people that live in their area of the state (called a district).	
⇒ Representatives are elected for two-year terms. Representatives are also called <b>Congresspersons</b> .	
⇒ The <b>Speaker of the House</b> is in charge of the House of Representatives.	

<b>The U.S. Senate</b>	
⇒ There are 100 Senators. Each state has two U.S. Senators.	
⇒ We also decide who the Michigan Senators will be by voting. They also speak on behalf of the people in Michigan.	
⇒ Senators are elected for six-year terms.	
⇒ The <b>Vice President</b> of the United States is in charge of all meetings of the Senate. He only votes if there is a tie.	



### ***Judicial Branch***

The judicial branch is the court system for the federal government. It is the responsibility of the judicial branch to explain what laws mean. Federal courts hear civil cases based on state law involving citizens of different states. They also hear civil and criminal cases based on federal law such as copyright, admiralty, patents, civil rights, mail fraud, and drug crimes.

<b>Supreme Court</b>	
⇒	The Supreme Court is the highest court in the United States.
⇒	The Supreme Court is the final decision maker in lawsuits.
⇒	The Supreme Court decides whether laws are constitutional.
⇒	The Supreme Court has nine judges, called justices.
⇒	The President picks who the Supreme Court justices are when there is an open slot.

<b>Court of Appeals</b>	
⇒	The Court of Appeals hears cases from the District Courts for a second time.

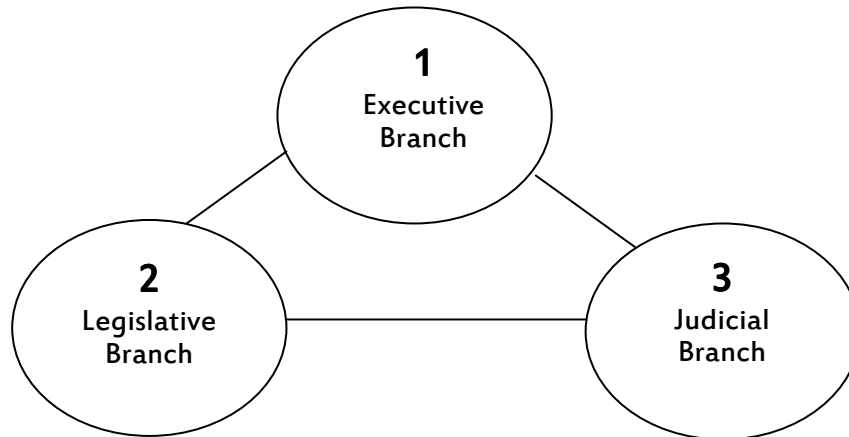
<b>District Court</b>	
⇒	The District Courts are the general courts or the trial courts at the federal level.

The United States is divided into ten "circuits" or areas, plus one for Washington, D.C. Each circuit has a Court of Appeals and several District Courts.

## State Government



The state government of Michigan directs and manages what happens in our state. It is set up like the federal government. It, too, is divided into three branches:



### ***Executive Branch (State)***

The executive branch of the state government carries out the laws written by the legislative branch.

The **Governor** is the head of the executive branch. The Governor works with the legislative branch to write and carry out laws.

The Governor must:

- Enforce laws.
- Appoint or pick people to be in charge of certain departments.
- Give a speech once a year to the people who live in Michigan telling them what is happening in the state and government. This speech is called the State of the State Address.
- Plan a budget each year, which lists where the state's money will be spent.

### ***Legislative Branch (State)***

The legislative branch is the part of the state government that writes and makes laws that everyone in the state must follow. It is divided into two groups called houses. Just like the federal government, one house is called the House of Representatives and the other house is called the Senate. All representatives from both the House and Senate are people from the state of Michigan.



<b>Michigan House of Representatives</b>	
	<ul style="list-style-type: none"> <li>⇒ We decide who will be our representatives by voting. Representatives speak on our behalf.</li> <li>⇒ There are 110 representatives.</li> <li>⇒ Each representative represents a certain area in Michigan. These areas are called districts.</li> <li>⇒ Representatives are elected to two-year terms.</li> </ul>

<b>Michigan Senate</b>	
	<ul style="list-style-type: none"> <li>⇒ We also decide who will be our senators by voting. Senators also speak on our behalf.</li> <li>⇒ There are 38 senators.</li> <li>⇒ Each senator represents a different part of the state.</li> <li>⇒ Senators are elected to four-year terms.</li> </ul>



It is important to know who the representative and senator are that represent your area. These are the people talking for you and making laws for **YOU**. Make sure they know who you are and what you think about issues that are important to you.

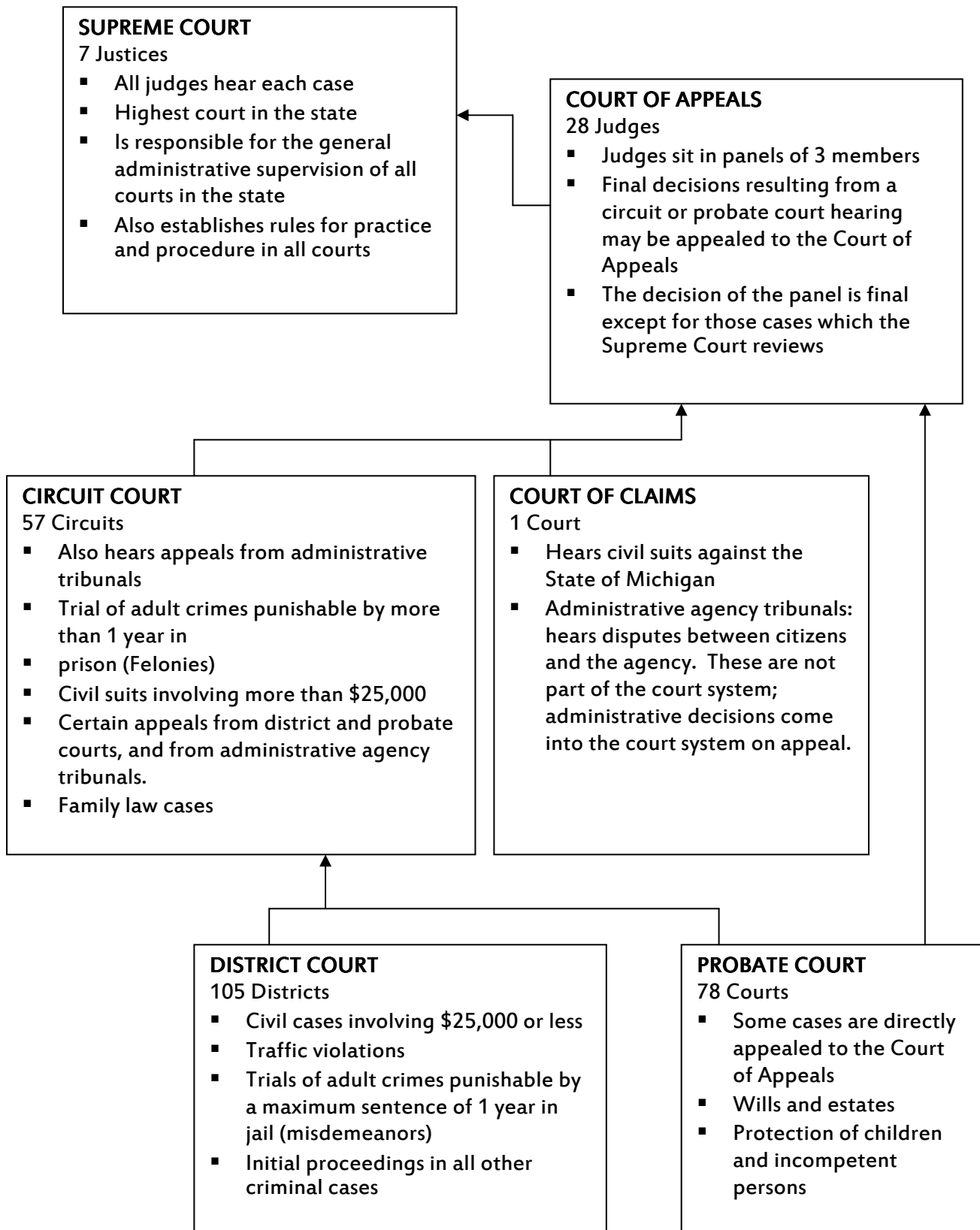
***Judicial Branch (State)***

The judicial branch is the state court system. State courts hear civil and criminal cases based on state law such as contracts, family law, wills, traffic violations, and most crimes.

Michigan has district courts, probate courts, circuit courts, a court of claims, a court of appeals, and a supreme court. The Supreme Court is the highest court in Michigan.



Michigan's Judicial Branch currently includes 617 judges and 246 different courts. These numbers change from year to year.





## Local Government



The local government in Michigan manages and directs what happens in your city and town. There are 83 counties in Michigan. Each county, city and township has its own government.



**ELECTED OFFICIALS** are the people the majority of people voted for to run your town, state, and United States government.

Here are some typical elected officials in a city or county:

- **Mayor:** every city has a mayor or someone who manages the city.
- **City Council:** a city council is made up of people who represent areas in a town. An "at large" council person represents everyone in the town. The council makes laws (ordinances) for the town.
- **County Board of Commissioners:** the county board of commissioners is made up of people who represent areas in a county. The board of commissioners makes laws for the county.
- **Prosecuting Attorney:** the prosecuting attorney is the chief law enforcement officer for the county.
- **Sheriff:** The sheriff is responsible for maintaining peace in the county and coordinating the activities of police departments in the county.
- **County Treasurer:** the county treasurer collects taxes and handles the county's money.
- **County Clerk:** the county clerk maintains county records, including birth and death certificates, and runs elections and voting.

## Constituents

Constituents are the people who vote. **You** are a constituent of the state and federal representative and senator from your area. **You** are also a constituent of the elected officials of your town.



It is important to know who your elected officials are so you can tell them your views. You can use the tool on the next page to assist in identifying your elected officials.





### Identifying Your Elected Officials

There are many ways you can find out who your senators and representatives are: 1) requesting a copy of "A Citizens Guide to State Government," 2) visiting the government's website at [www.michigan.gov](http://www.michigan.gov), or 3) the phone book often lists your federal, state, and local government officials in the first few pages.

You can begin by finding out what your town's district numbers are. There will be different district numbers for each official person. Find your county. Write the number in the space below.

#### Federal Legislators

U.S. Congressional District Number \_\_\_\_\_

Federal Congressperson's (Representative's) Name

\_\_\_\_\_

Address \_\_\_\_\_

Telephone Number \_\_\_\_\_



*You have 2 federal senators that represent the State of Michigan*

U.S. Senator's Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number \_\_\_\_\_

U.S. Senator's Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number \_\_\_\_\_

#### State Legislators

Michigan Representative District Number \_\_\_\_\_

Representative's Name \_\_\_\_\_

Address \_\_\_\_\_

Telephone Number \_\_\_\_\_





Michigan Senate District Number \_\_\_\_\_

Senator's Name \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Telephone Number \_\_\_\_\_

**Other Elected Officials:**

**Governor**

The Governor of Michigan \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Telephone Number \_\_\_\_\_



**Mayor**

My mayor is \_\_\_\_\_

Address \_\_\_\_\_

\_\_\_\_\_

Telephone Number \_\_\_\_\_



There are several other elected officials that you may want to have contact information for such as your county commissioners, city council, township supervisor, etc.

**Remember: It is important to talk with elected officials and let them know what you think about issues that are important to you. They count on your vote to keep their jobs.**



## **Additional Information on the State and Federal Government**

For more information on the Michigan Courts, visit  
<http://courts.michigan.gov/index.htm>

For more information on the Michigan House of Representatives, visit  
<http://house.michigan.gov/>

For more information on the Michigan Senate, visit <http://senate.michigan.gov/>

For more information about the state government, visit <http://www.michigan.gov/>

For more information on the Federal Courts, visit <http://www.uscourts.gov/>

For information about the Federal House of Representatives, visit  
<http://www.house.gov/>

For more information about the Federal Senate, visit <http://www.senate.gov/>

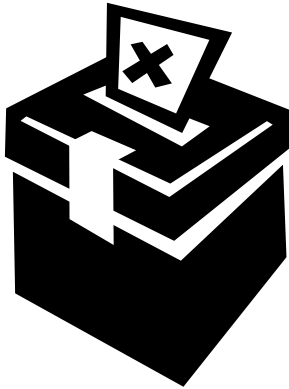
For more information about the federal government, visit <http://www.usa.gov/>



United Cerebral  
Palsy of Michigan  
[ucp@ucpmichigan.org](mailto:ucp@ucpmichigan.org)

Connections for  
Community Leadership  
[leadership@prosynergy.org](mailto:leadership@prosynergy.org)

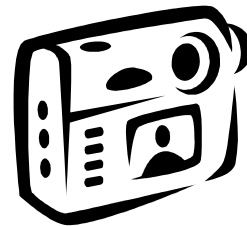
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# Chapter 7: Voting

## SNAPSHOT

- Why voting is important
- How to register to vote



This is one chapter of a larger leadership manual called "Creating Change Together."





# Voting

We made decisions about who will speak for us and what laws are made by voting. You have a right to vote because you live in the United States and you are a citizen. Voting is a powerful way to be heard and an important part of being a leader and self-advocate.



**VOTING** is a way to make a choice for something you want or for someone you want to represent you.

## Elections

All of the elected officials mentioned in the previous chapter are selected by voting. This takes place during a time called elections.



An **ELECTION** is when you vote.

Every elected official represents an area or place where a certain number of people live. The people who live in this area vote during elections to select the official they want to represent them. The person with the most votes wins and becomes the elected official for that area.

You can vote for many things, such as who you want to be the president of the United States, your town's mayor, and your state's governor.

Elected people are responsible to **YOU** for what they say and do, and the way they vote on issues. Elected legislators and public officials need your vote to keep their jobs. Your opinion is very important to someone who is elected to the job.

## Voting Information

In order to vote in the United States, you must:

- Be 18 years old
- Be registered to vote
- Be a citizen of the United States

### ***Registering to Vote***

To register to vote, you need to follow 3 basic steps:

**Step 1:** Verify that you are eligible to vote (that you are at least 18 years of age and a citizen of the United States).

**Step 2:** Fill out the application.

You can get an application at any of the following locations:



- Your local Secretary of State branch office
- Your local county, city, or township clerk's office
- Offices of several state agencies, like the Department of Human Services, the Department of Community Health, and the Department of Labor and Economic Growth
- Military recruitment centers
- Voter registration drives
- Online at [www.michigan.gov/sos](http://www.michigan.gov/sos)

### **Step 3:** Submit the application.

You can submit the application to your local city or township clerk's office. You can also submit it to the Secretary of State's Office.

**REMEMBER:** You need to bring your photo identification card or driver's license with you. Also, in order to vote, you must be registered at least 30 days before Election Day.

Once the application is processed, you will then get a voter registration card. This card has your name and address, as well as important voting information such as your district numbers and polling locations. You want to keep your voter card with you or in a safe place that you will remember.

## ***Voting***

There are a two ways to vote: 1) in-person, and 2) absentee ballot.

### In-Person

When you go to the polls on Election Day, you will be asked to present identification. If you don't have acceptable photo ID, you can vote by signing an affidavit. The affidavit can be used by 1) voters who don't have acceptable photo ID or 2) voters who have photo ID but didn't bring it to the polls.

Acceptable photo ID includes:

- Driver's license
- Federal or state government-issued photo identification card
- U.S. passport
- Military identification card with photo
- Student identification with photo from a high school or an accredited institution of higher education, such as a college or university
- Tribal identification card with photo

If you do not have a driver's license or other acceptable photo identification, you can get a state identification card at your local Secretary of State branch office for \$10. State ID cards are free to individuals who are 65 or older, blind, who have had driving privileges terminated due to a physical or mental condition, or who





can show another good cause for the fee waiver. Proof of identity and residency are required when applying for a state ID card.

### Absentee Ballot

Absentee voter ballots are available for all elections. They provide voters with a convenient method for casting a ballot when they are unable to attend the polls on Election Day.

As a registered voter, you may obtain an absentee voter ballot if you are:

- Age 60 years old or older
- Unable to vote without assistance at the polls
- Expecting to be out of town on election day
- In jail awaiting arraignment or trial
- Unable to attend the polls due to religious reasons
- Appointed to work as an election inspector in a precinct outside of your precinct of residence

If you want to vote absentee, you need to request a ballot. Your request for an absentee voter ballot must be in writing and can be submitted to your city or township clerk (for assistance in obtaining the address of your city or township clerk, see [www.michigan.gov/vote](http://www.michigan.gov/vote)). Your request must include one of the six reasons stated above and your signature. You must request an absentee voter ballot by mailing the online application, a letter, a postcard, or a pre-printed application form obtained from your local clerk's office. Requests to have an absentee voter ballot mailed to you must be received by your clerk no later than 2 p.m. the Saturday before the election.

Once your request is received by the local clerk, your signature on the request will be checked against your voter registration record before a ballot is issued. You must be a registered voter to receive an absentee ballot. Requests for absentee voter ballots are processed immediately. Absentee voter ballots may be issued to you at your home address or any address outside of your city or township of residence.

After receiving your absentee voter ballot, you have until 8 p.m. on Election Day to complete the ballot and return it to the clerk's office. Your ballot will not be counted unless your signature is on the return envelope and matches your signature on file. If you received assistance voting the ballot, then the signature of the person who helped you must also be on the return envelope. Only you, a family member or person residing in your household, a mail carrier, or election official is authorized to deliver your signed absentee voter ballot to your clerk's office.



Visit the Michigan Voter Information Center at [www.michigan.gov/vote](http://www.michigan.gov/vote) for information about registering to vote and voting, voting equipment, polling place locations, state and local ballots, the candidates, campaign finance, and more.

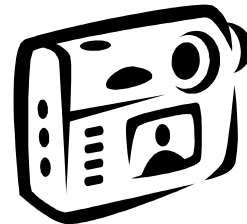




# Chapter 8: Talking to Public Officials and Decision-Makers

## SNAPSHOT

- How to talk to elected officials and decision makers about what is important to you
- The different ways to talk to elected officials and decision makers



This is one chapter of a larger leadership manual called "Creating Change Together."





## Talking to Public Officials & Decision Makers

Writing and talking to public officials and decision makers are ways you can let them know what you think about a law or something that is happening that is important to you. There are several ways you can talk to your public officials such as:



- Writing them letters
- Sending an email to your public official
- Participating in electronic campaigns
- Meeting with your public officials
- Talking to them on the phone
- Going to a public hearing
- Inviting public officials and decision makers to your organization

**REMEMBER:** It is always a good idea to talk to public officials and decision makers when they do things you like – not just when they do things you don't like.

*Use the form on page 85 to see who your elected officials are.*

### **Write Letters**

As an advocate, most of your letters will be written to accomplish a simple and specific objective such as: to request a meeting, to request information, to make an appointment, to express your opinion, or to thank someone. A letter is the best way to make such requests since it is more likely to get a response than a telephone request. Letters are also effective ways to communicate because by putting your message on paper, you force yourself to organize your thoughts and give yourself time to edit it so that the message is exactly what you intend to say, which is its most powerful form.

These letters should be short and to the point. In addition, a personal story that allows the person you are writing to see the importance of the issue from your point of view can be very powerful. Your letter does not have to be long or complicated. Your letter will let the person you are writing know that one of her or his constituents is concerned about an issue.

When writing a letter, remember:

- Get your facts straight. Only use correct information.
- Stick to one point.
- Use your own words. Form letters can work, but add a paragraph with your own words.
- Don't make threats.



- Write simply and clearly. Keep in mind that the person reading the letter may not know the information as well as you do.
- Don't forget to put your name and return address on the letter.

The best letters are:

- **Substantive** – Use facts to show how the issue impacts your personal life, your business, your customers, employees, and community. Include fact sheets, brochures, or other documents supporting your position.
- **Specific** – Do not assume the person you are writing knows the issue. Start from “A” and go to “Z.” Even if the person knows the issue, he or she may share the letter with someone else who does not know the issue. Provide facts and specific information.
- **Timely** – Write when the issue is up for a hearing or a vote. Also write when you know an issue will become a “hot” topic in the government.
- **Brief** – Try to keep your letter to one page (one-sided), and never go beyond two pages.
- **Personalized** – If you work for an organization, check and see if you can use their letterhead. Also, add a personal story to the letter explaining how the issue affects you personally.
- **Polite** – Calling an elected official or decision maker a jerk or stupid is a bad idea. Even if you disagree with them, state your points politely and respectfully.
- **Focused** – Limit your letter to one or two issues. Make your position and issue clear in the opening paragraph, and use the rest of the letter to support your argument.
- **Action Oriented** – Your letter must include a clear call to action that tells the elected official or decision maker what you want them to do – vote yes, look into the issue, etc.

### ***Materials and Style***

Your advocacy letters are business letters and should be consistent with standards for good business letters. You should use plain white printing/copy paper or your company's letterhead paper. To ensure that your letter is easy to read and looks professional, you should type it on a computer (or ask a friend or family member to help you type it on a computer). Use a business style in setting up your letter. If you are not sure what a business style looks like, pay attention to the style of the sample letters in this manual. When you are finished with your letter, make sure to carefully check if for any spelling errors, grammar errors, or missing punctuation. Careless errors will decrease your credibility and may cause your reader to conclude that you are not serious enough about your request, so you should always make sure your letter is correct.



### ***What Goes in the Letter***

It is a good idea to make a short outline or list of points you want to include before you write your final copy of the letter. This will help you organize your thoughts and will result in a well-organized letter. There are some key things that should go in every letter. These include: date, contact information, bill number (if writing a legislator), reason for writing, why you support or oppose the issue, a request for a response to your letter, and a thank you.

Date

Senator's Name

Address

City, State, Zip Code

Dear Senator:

**Bill number:** If you are writing about a bill, give the number of the bill.

**Reason for writing:** Tell your personal story and how the issue affects you, your family, and your community.

**Why you support or oppose the issue:** State the reasons for supporting the issue or why you are against it.

**Ask for a response to your letter:** Ask the person to respond and to tell you her/his opinion on what you are writing about.

**Call to action:** Clear statement of what you are asking them to do.

**Thank the person:** Thank the person for their time and also thank them if he or she has done something you think is right.

Sincerely,

Your Name

Address

City, State, Zip Code

Phone Number

Email Address (if you have one)

### ***Who to Send the Letter to***

It will take longer to get a response to your letter if you send it to the wrong person or if you address it to an agency rather than a specific person within the agency. If you are unsure as to whom the letter should be addressed, call the



agency and ask them to give you the name, correct spelling, and title of the person who handles the type of request you plan to make in your letter. Make sure you have the correct address and a telephone number to use in following up on your letter.

Always make sure to keep a copy of the letters you send for your records. We recommend that you send the letter by certified mail and request a return receipt so that you know the letter was delivered and accepted. Keep the receipt as part of your record. It's also a good idea to note the date by which you expect your reply on your calendar or in your records. If you do not receive a reply by the date requested, call to find out when the person will respond to your request. If necessary, write a second letter pointing out the fact that you have made a request but have not yet received a reply.

On the following pages are several sample letters written as part of an advocacy plan.

### ***Having Someone Write on Your Behalf***

TIP: When you ask someone else to write on your behalf, it is a good idea to have a draft letter, or at least talking points or key messages, for them to use as a guide.

Individuals who may write on your behalf include:

- Your board members
- Your satisfied consumers
- Co-workers or other members from your group
- Representatives from local community boards
- Community members
- Family members
- Your agency director





May 12, 2006

James E. Dough  
Director of Special Education  
Sante Fe School District  
1802 East Maryway  
Sunnyville, MI 46501

Dear Mr. Dough:

I am the parent of Julia Smiles, a first grader at Central School. I suspect that Julia may have a learning disability. Please evaluate Julia to see if she is eligible for special education services.

Please tell me in writing when the evaluation will be done and who will perform the evaluation so I can give written consent. I look forward to hearing from you within a week regarding your plans for Julia's evaluation. Please send your letter to me at the address below.

Thank you for your cooperation in ensuring the best education for my daughter.

Sincerely,

Jane Smith  
364 Landscape Street  
Sunnyville, MI 46501  
(123) 555-3259

CC: File



January 2, 2007

Ms. Sandy Loves  
Michigan Rehabilitation Services  
29472 Lilly Lane, Suite 100  
Handville, MI 45239

Dear Ms. Loves:

I am a client of your office. I am interested in receiving a copy of your agency's written policy on financial assistance for clients who wish to earn a college degree. I understand that this policy is a public document and that I have a right to review and to receive a copy of it under the Michigan Freedom of Information Act (MCLA 15.231 et seq). I would be happy to pay a reasonable cost to cover Xeroxing and postage, if this is necessary.

Please send the information to me at the address below. Thank you for your prompt response to my request. I look forward to hearing from you by January 16, 2007.

Sincerely,

Mark Mouth  
1 Happy Lane, Apt. #7  
Handville, MI 45239  
(123) 555-9651

CC: File



April 12, 2007

The Honorable Valde Garcia  
Michigan State Senate  
PO Box 30014  
Lansing, MI 48909-7514

Dear Senator Garcia:

I am writing you today to encourage you to support legislation that provides funding for the Michigan Housing and Community Economic Development Fund. Michigan's Housing and Community Development Fund is a \$100 million annual fund that will help transform our economy by improving the quality of life in Michigan's cities, towns and villages creating vibrant communities where people want to live, work, play and retire. Building and sustaining vibrant communities is central to any plan to revitalize Michigan.

Michigan's Housing and Community Development Fund is about **investing in people**. It's about investing in a better quality of life for all of our people. It's about moving our working homeless population off the streets and into a stable home environment. It's about providing our citizens that are experiencing homelessness with safe, supportive living conditions.

Michigan's Housing and Community Development Fund is about **housing an economically diverse workforce**. It will increase the supply of affordable, accessible market rate housing. It will help provide a stable home environment for families. It will provide safe, high-quality housing. Safe, quality housing, both owned and rental, is the critical missing piece in transforming our economy. States with healthy economies see the connection between job growth and housing. People with disabilities need access to safe, affordable, accessible housing.

Michigan's Housing and Community Development Fund is about **job creation, workforce retention, and economic development**. It's essential for Michigan's economic future. It builds vibrant cities, towns and villages that will attract and retain the changing workforce. It is estimated that housing developments will have a return of 1:3 and community development projects a return of 1:2. A \$100 million program will leverage an additional \$280 million, would create more than 6,000 good-paying jobs and will generate approximately \$21 million in-state and local taxes.

I would like to know your position on legislation that provides funding for the Michigan Housing and Community Economic Development Fund. You can send your position to me at the address below. Thank you for your time and attention to this matter. I look forward to hearing from you soon.

Sincerely,

Your name and address



November 1, 2006

The Honorable Valde Garcia  
Michigan State Senate  
PO Box 30014  
Lansing, MI 48909-7514

Dear Senator Garcia:

I am writing to ask you to support HB 5389, which will allow the creation of Single Points of Entry (SPE) for us to learn about and use Long-Term Care (LTC) efficiently. This bill has already passed in the house, and now we need your support. I want choice over where I get long-term supports, when and if I need them, and I want those same choices for my family.

Long-Term Care has become so complicated that good information is just as important as need in setting up the right kind of LTC supports. An SPE can do that without the bias of financial interest that providers have.

Please vote for real LTC Choice. Support HB 5389.

Sincerely,

Sally Sun  
526 Advocacy Street  
Voices, MI 43169  
(123) 555-1137  
sallysun@aol.com



### Addressing the Letter

When writing to your elected officials, be sure to properly address them. Here are the proper ways to address some of the elected officials you may want to write to:

#### Federal Government Elected Officials



***President of the United States***

The President  
The White House  
Washington, D.C. 20500

Dear Mr. President:

***Senator in U.S. Congress***

The Honorable your senator's name  
United States Senate  
Washington, D.C. 20510

Dear Senator last name:

***Representative in U.S. Congress***

The Honorable your representative's name  
United States House of Representatives  
Washington, D.C. 20515

Dear Congressman or Congresswoman:

#### State Government Elected Officials



***State of Michigan Representative***

The Honorable your representative's name  
Michigan House of Representatives  
PO Box 30036  
Lansing, MI 48909-7536

Dear Representative person's last name:

***State of Michigan Senator***

The Honorable your senator's name  
Michigan State Senate  
PO Box 30014  
Lansing, MI 48909-7514

Dear Senator person's last name:

***Governor of Michigan***

The Honorable governor's first and last name  
Governor of Michigan  
State Capital  
Lansing, MI 48909

Dear Governor last name:



### **Practice Exercises**

Draft a letter as an individual or in small groups. Afterwards, review it to make sure it has the necessary components of a successful letter. Have other people read the letter and offer suggestions.

Compare the sample letters in the previous pages with the components of a successful letter. As a group, decide what changes need to be made to make the letter stronger and finish the letter together.

## **Letter Writing Campaigns**

It is always better to have many voices saying the same message to a legislator. This has been proven to be more effective. Think about it – if your legislator receives numerous letters on the same issue, he or she is forced to recognize that it is an issue of concern to their constituency and, in turn, will act on it. Even a few voices can have a significant effect. As one Michigan Legislator put it, “If I hear from one person, I have to acknowledge that people are thinking about it. If I hear from five or six people, I really have to sit up and take notice!”

Therefore, letter writing campaigns can be very effective. It is a network of people whom you can contact when issues of concern to you and your organization arise. If done correctly, letter writing campaigns can have a significant impact on policy makers’ understanding of constituents’ needs and gives each individual an opportunity to emphasize their point with a personal story and first-hand knowledge of the issue.

One of the most effective ways to start a letter writing campaign is to distribute an action alert to briefly provide the background information, desired course of action, and targeted individuals. In your alert:

- **Be brief.** In one (no more than two) pages, discuss the issue or legislation.
- **Call for immediate action.** Spell out exactly what action is necessary, and the timetables involved.
- **Provide a sample letter.** Be sure to stress, however, that sample letters should be used only as a guide or template. Personalized letters expressing individual experiences and perspectives are more effective than “form letters.”
- **Distribute the alert to the broadest spectrum possible.** If time permits, mail to potential allies or ask for mailing lists from organizations and coalitions who share concern on the issue. You may also ask organizations and coalitions to send the action alert to their members.

With the rise in use of computers and emails, several organizations use computer software to create electronic letter writing campaigns. The organization will pick an issue important to their community. Then community members can create an



account with the software program and it will automatically create, write, and send an email to your representatives about that issue.

One example of an electronic campaign is GetActive. GetActive is a program that allows participants to send a composed or personally constructed letter to their legislators with just one click of a button. For example, an individual can go to the GetActive website and create an account. Once the account is set up, the individual can view information on different policy issues relating to people with disabilities. When the person finds an issue important to them, they can take action by sending a letter to their legislators (GetActive will even identify their legislators for them).



### **Electronic Letter Writing Campaigns to Join**

Michigan Disability Rights Coalition and Disability Network Michigan

[http://www.dnmichigan.org/get\\_active.aspx](http://www.dnmichigan.org/get_active.aspx) - Information

<http://ga3.org/mdrc/join.html> - To join

United Cerebral Palsy Michigan

<http://ga4.org/ucpmichigan/home.html> - Information

<http://ga4.org/ucpmichigan/join.html> - To join



### ***Practice Exercise***

Brainstorm different issues and select just one. Write a letter to use in a letter writing campaign. Once the letter is done, practice taking that letter and personalizing it.

## **Phone Calls**

Phone calls are the quickest way to let elected officials know how you feel about something. Phone calls are usually used when an issue requires urgent attention or during a crisis. When you call an elected official, you may not be able to talk directly to that person. Most likely, you will talk to a person who works for the official. The person you talk to is responsible to make sure that the elected official knows that you called.

When you call, be sure to:

- Tell the person your name and why you are calling
- Tell them what you think about the issue you are calling about
- Ask for a written answer to your call
- Give the person your name and address
- Get the name of the person you talked to

### ***Calling an Elected Official***

Here are a few key points when placing a phone call to an elected official:



- Call the legislator at his/her state or district office. Lawmakers tend to be in Lansing Tuesday to Thursday. Call during normal business hours – 9:00 a.m. to 5:00 p.m.
- Though it is better to talk to the legislator, it is okay to talk to their staff person. Many elected officials rely heavily on their staff person.
- Legislators have phones at their desks and on the floors of the House and Senate. If a legislator is in session, and you really need to talk to him/her, ask to be forwarded to the floor phone (this is especially important when a critical floor vote on your issues is about to occur).
- Do not hesitate to call an elected official at home if the matter is urgent or you have been unable to reach her/him in Lansing. Lawmakers tend to be in their districts from Friday through Monday when the Legislature is not in session. Lawmakers are elected by the public to represent the public and most welcome – or at least expect – phone calls at home.
- Most elected officials have a cell phone. Ask for the number.
- It is good to plan out what you are going to say ahead of time. You do not need a script, but at least an outline of major points you want to make.
- The same principles that apply to writing a good letter, apply to making a good phone call. A good phone call must be:
  - Substantive
  - Comprehensive
  - Timely
  - Brief
  - Polite
  - Focused
  - Action Oriented



You can follow up your phone call with a letter to tell the elected official more about how you feel about the issue.



### ***Practice Exercise***

Brainstorm different issues and select just one. Plan out what you would say to an elected official or decision maker on the phone. Now have someone you know or someone in your group role play with you. You be yourself and have the other person be the elected official or decision maker.

## **Meet with an Elected Official**

You can meet with an elected official, or someone who works for the elected official, in person at any time because you are a citizen and a taxpayer. Elected officials appreciate visits from their constituents. Often, constituents will sit in the House or Senate balcony as guests of their legislator, who will announce her or his guests to the other members. This is a good opportunity to see your legislators





in action on their turf and carry your messages to them as well. Try to visit your elected official at least once a year.

### ***10 Easy Steps to a Successful Legislative Visit***

1. **Arrange a visit.** You should call or send a letter of introduction. Include information on your subject area and the background of your organization (if you belong to one). Request an appointment to discuss your ideas or explain why their support on this issue is so important. Legislators are in their districts on a schedule, so call their office to make an appointment.

Do not be discouraged if occasionally your appointment is attended by a staff member instead of the legislator. The staff members are often more informed on certain issues of concern to you and they have influence over their boss, if the argument is compelling. Building a relationship with the staff member *and* your elected official can be quite beneficial, opening more doors for you in the future.

2. **Plan for your visit.** Organize a short presentation before you go to the meeting. If you are going with a group, get together before the meeting to map out your strategy. Assign each member of your group a topic to discuss; this ensures that the necessary matters are raised during the meeting. Prepare brief fact sheets and other reference materials for distribution at the meeting, or send them to the elected official before the meeting for background information. Try to include people whom the legislator knows.
3. **Prepare your talk.** Expect only 5-10 minutes to make your case or if you go with a group 20 minutes total. No one wants a song and dance or a chronology of life events (that is why you bring a fact sheet and materials). Include local personal experiences and stories that show the affect your issue has on the community.
4. **Practice.** Tape your speaking points, listen to yourself and critique your presentation and then share it with someone else who knows very little about the issue. Ask that person if they understand the points you are trying to make.
5. **At the meeting,** ask legislators their feelings on your issues. If they do not know the issue, have background materials available and offer to explain and follow up with answers to their questions. Bring copies of all important materials and duplicates of any information you had sent out before the meeting. Do not depend on them to have kept copies of what you sent.
6. **Don't fudge the truth.** If you do not know an answer, offer to get back with the correct information. By making this promise, it gives you a second change to plug your issue.
7. **Educate – don't preach.** Everyone wants to know, "what's in it for me?" As an advocate, your job is to present factual information that educates policymakers and/or their staff about the benefits of allocating resources to your issue.



8. **Do not apply too much pressure.** First impressions are important. Be assertive, not aggressive (see the section on assertiveness). Listen carefully to their concerns, because ultimately they need to be addressed. If they have a point of view or a concern, note it so you can provide feedback or otherwise deal with their hesitation.
9. **Leave information.** If you have one, leave a business card. Or, leave your name, address, and telephone number on the materials you are leaving for the policymaker and/or their staff.
10. **Send a thank you.** A simple note of thanks goes a long way. In your letter of thanks, recap what was discussed, what was planned for or promised (if anything), and your willingness to provide additional information if needed.



You can also invite an elected official to visit your organization. You can invite them to events your organization is hosting or you can ask them to come and answer your questions.



### **Practice Exercise**

Pick an issue that you would want to talk to an elected official about. Now, fill out the sheet at the end of this chapter to help you plan your visit.

## **Public Hearings**

Public hearings are held when elected officials or public agencies want to know what people think about something they will be making a decision about. For example, your local transportation system may have a public hearing to find out what people think about the public bus service and to hear what people think about the changes the transportation system would like to make to the current bus system.

At a public hearing:

- People take turns talking to the elected officials about their thoughts on the topics being discussed.
- You do not have to talk if you do not want to. You can just listen to what other people are saying.

If you want to speak at a public hearing you need to:

- **Do your research:** Read the actual bill and any available materials on it. Check all your facts and figures. If you or your group are presenting a suggested amendment, be sure that it is complete, accurate, and ready for distribution.
- **Prepare your statement:** You will be given the opportunity to distribute a written copy of your testimony. Be sure that it is clear, concise, and proofread.



- **Sign up to speak:** Arrive early so you have time to sign up to speak at the meeting. There will usually be someone by the door or at a table whom you talk to about signing up to speak.
- **Time:** Find out how much time you have to speak. There are usually limits on how much time you will be allowed. It is best to keep it short. If you realize the time will not be enough to make all of your arguments, prepare a presentation of highlights and ask to have your full written position and supporting materials be added to the record.
- **State your name:** When it is your turn to speak, tell the elected officials who you are. Also tell them what group or organization you are with (if you are with one).
- **State your issue:** Tell them why the subject being talked about is important to you. Stick to the subject, relating your experience and views directly to the issue.
- **State your opinion:** Tell them why you agree or disagree with what the item being talked about will do.
- **Avoid propaganda:** You are trying to persuade the committee members to adopt your viewpoint – aggressive or obnoxious behavior, or arguments based only on emotion, are only likely to alienate the committee members.
- **Say thank you:** Thank the elected officials for giving you the chance to talk about what you think.
- **Answer questions:** The elected officials may want to ask you some questions. If you do not know the answer to a question they ask, say you do not know, but you will find out for them. Then do it. It is very important to follow up.

Even if you prefer not to testify, your presence at hearings or meetings can be very important in influencing how a committee reports on a bill. It is important to have as many people there on your side as possible. If you or other individuals do not want to testify, you can also just fill out a card with your name and whether or not you support the issue. Then the committee will read the cards that show the legislators whether the majority of the people in the room support or oppose the issue.

**Public hearings are a good way to learn more about a law or change that you do not know much about.**





## **Planning Sheet – Visit with Policy Maker**

### **1. Reason for the visit:**

What issue are you going to talk with them about?

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### **2. Why the issue is important:**

What personal story will you tell about the issue? What picture can you use to help tell your story?  
How does the issue affect you, your family, and your community?

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### **3. Your position on the issue:**

What are your reasons for supporting the issue or why you are against it?  
What facts or information support your position?

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How many people do you represent? Who else supports your position?

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### **4. Respond to the policy maker's questions:**

What questions might the policy maker have? How will you respond to them?

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### **5. Information to leave with them:**

What written materials will you leave with them? Do you need to write something? Can you find materials that your allies have written?

If you are supporting or opposing a bill, give the number of the bill.

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**6. Call to action:**

What do you want them to do about your issue? What action are you requesting?

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**7. Setting up the visit:**

What policy maker are you going to visit? Who can give you what you are asking for?

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Who will be going to see the policy maker?

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Who will make the appointment with the policy maker?

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What is the time limit? How will you keep your visit to the time limit? (5 minutes is normal for legislators and other elected officials.)

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**8. Dividing the tasks:**

Who is going to talk about which part?

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Who will find and bring the information to leave with them?

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Anything else you need to prepare?

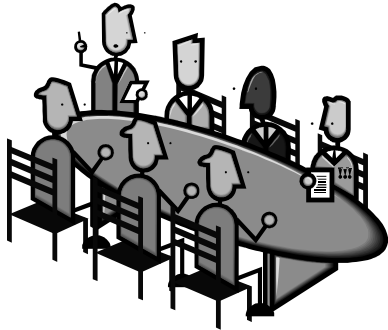
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Who will send a thank you note after the visit?

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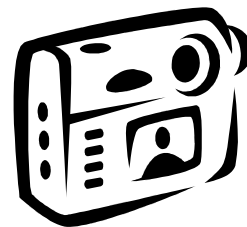
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# Chapter 9: Serving on Boards and Committees

## SNAPSHOT

- What boards and committees do
- How a board meeting works
- Being an effective member



This is one chapter of a larger leadership manual called "Creating Change Together."







## Serving on Boards and Committees

Boards, committees, councils and workgroups make many important decisions that affect the lives of people with disabilities. They all have meetings and rules about the ways they run the meetings. If you understand how they run their meetings, you can help them make better decisions.

### **Governing Boards**

Most organizations have a governing board. A governing board is also called a board of directors. This is a group of people who make decisions about the organization and how it works.



A **GOVERNING BOARD** is a group of people who make decisions about how an organization works.

Most organizations that advocate for people with disabilities have a governing board. Going to a meeting or becoming a member of the board of directors are good ways to advocate for yourself, your family, and your community.

The people on the governing board are called directors or board members. Directors are either elected or appointed to the board. People that serve on the board of directors must:

- Be interested in the organization
- Be able to work with other people
- Have the time to be on the board and be willing to work
- Understand what the board of directors is
- Understand how meetings are run
- Understand the responsibilities of being on the board of directors

Sometimes, a board of directors may have committees. Committees are small groups of people who work together to do certain jobs, like fundraising, refreshments, publicity, and transportation. If you become a board member, you may be asked to join a committee as well. This will mean you are to attend more meetings and have additional responsibilities.



There are disability advocacy organizations called Centers for Independent Living (a.k.a. Disability Networks) all over the state of Michigan. Each one of them has a board of directors and they are required to have a certain number of people with disabilities serve on them.



## Advisory Committee

An advisory committee gives ideas and suggestions to an organization. They may also give suggestions to the board of directors or governing board. For example, the Community Mental Health Board has a Consumer Advisory Committee. An advisory committee may review policies and plan presentations for conferences. However, the board of directors has to approve the policies and give permission to go to a conference.



An **ADVISORY COMMITTEE** is a group of people who give ideas and suggestions to an organization.

The responsibilities of an advisory committee member are a lot like the responsibilities of members of governing boards. The biggest difference is that the advisory committee members make suggestions to an organization and governing board members make decisions about the organization.



Many local transportation authorities have Local Advisory Committees (LACs). Joining an LAC is a great way to advocate for the accessibility of the public transportation system in your town.

## Officers



**OFFICERS** are board or advisory committee members that have a certain job to do.

Both governing boards and advisory committees have officers. Officers are the members that have certain jobs and responsibilities. The most common officers include:

- **President or Chairperson:** This person runs the meetings and makes other decisions in between meetings.
- **Vice President or Vice Chairperson:** This person runs the meeting and makes decisions if the president cannot be there.
- **Secretary:** This person keeps notes of what happens at the board or committee meetings and writes them up later. These notes are called minutes.
- **Treasurer:** This person keeps track of the money the board has. The treasurer may pay bills and collect dues. Dues are money that people pay to be part of an organization. Not all organizations have people pay dues.

## Board and Committee Meetings

Effective meetings require planning in advance, both by the chair and the people who attend.



An **AGENDA** is a list of things to talk about at the meeting.

**BUSINESS** is the items included on the list that will be talked about.

### ***Agendas***

An agenda is very important. It helps the chairperson plan the meeting. It tells people why you are having the meeting. It helps members be prepared. The agenda may say how much time will be allowed for each item. The things talked about are called the business of the meeting.



## SAMPLE AGENDA

9:00 a.m.	Call the meeting to order	The president or chairperson starts the meeting.
9:15 a.m.	Approval of the minutes	The minutes that the secretary wrote for the last meeting need to be accepted and approved by the board or committee members.
9:30 a.m.	Reports President's report Secretary's report Treasurer's report Committee reports	Reports let everyone know what is going on. For example, the treasurer may give a report on how much money the group has.
10:00 a.m.	Old business	Old business is things that need to be talked about from the last meeting. These things will usually be listed on the agenda.
10:30 a.m.	New business	New business is anything new that needs to be talked about.
11:00 a.m.	Program	A guest speaker or training activity sometimes is useful for helping the group reach its goals.
11:45 a.m.	Adjournment	Adjournment means the meeting is over.



Committee members get an agenda for each meeting.

Be sure the purpose of each meeting, and each item on the agenda, is clear to the members:

- To share ideas and information.
- To generate new ideas.
- To make a decision.
- To make a recommendation.

Build in time to relax and have fun.

Celebrate all the work and decisions your organization has made.

Do not have a meeting unless there is a good reason for the meeting!!!

### ***Being an Effective Member***

As a board or committee member, you are responsible for several things. You need to:

- Attend meetings.
- Arrive on time.
- Make sure you understand the reason for a meeting and come prepared (you may want to make a list of things you want to talk about before you go to the meeting).
- Know the important issues.
- Know what you will say before you talk.
- List the points that you want to make.

During the meeting:

- Use the agenda to stay on time.
- Be sensitive to the needs of others.
- Raise your hand and wait to be called on.
- Ask questions if you don't understand.
- Stay in meetings until break time or until the meeting is over.
- Work on issues together. You are a team. Everyone counts.

When others are speaking:

- Listen and consider others' suggestions.
- Respect the thoughts, ideas, opinions and decisions of others.
- Listen with an open mind. Don't interrupt.

When you are speaking:

- Use your self-advocacy to speak up about what you think.
- Be sincere and talk from the heart.
- Include everyone – speak to the whole group not just one person.
- Actively engage in the discussion. Share your ideas when the group is making a decision. Clearly express your opinions.



- Try not to waste time by talking about things that are not on the agenda.

## **Making Meetings Accessible**

### ***“How to Support Real Participation”***

#### ***It Is True That:***

- Some people have a strong interest in taking part in organization or group meetings.
- It is difficult sometimes for this to happen.
- There are things that can take place to help make it easier for this to happen.

#### ***Your Responsibilities:***

- Let the organization or group know if you need support to attend meetings (such as transportation to meetings or help understanding the agenda).
- Work with a support person (a friend or someone in the organization or group) to prepare for meetings and to get transportation.
- Know who the contact person is for the organization or group. Call them if you cannot attend a meeting or if someone else is going to go in your place.
- Let the contact person from the organization or group know if you are having any problems as a member.

#### ***The Responsibilities of the Organization or Group:***

- Talk with you about your role and responsibilities as a member of the organization or group.
- Find out what you may need for support to go to, and to take part in, meetings.
- Help you find a support person to assist you as a member.
- Make meetings as easy as possible for you to attend and take part.
- Help find a way for you to give input into organization or group business even if you cannot attend a meeting(s).
- Keep language simple. Avoid jargon. Seek clarification.

#### ***Responsibilities of the Support Person:***

- Help you get ready for meetings.
- Help you find transportation to meetings.
- Attend meetings with you and give you support.
- Follow-up with you around organization or group business.
- Assure personal assistance is provided, if necessary.



The responsibilities of each person or group listed above may vary depending on your personal needs and abilities and the way you choose to get support as an organization or group member.

It is the responsibility of you, your support person, and the organization or group to keep in touch with one another to see if there is anything you need to continue to take part as an organization or group member.



### **More Information on Serving on Boards and Committees**

For More Information: “Get On Board and Make a Difference” from Green Mountain Advocates, <http://ddas.vermont.gov/ddas-publications/publications-gmsa/publications-gmsa-documents/get-on-board-2003>



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Connections for  
Community Leadership  
[leadership@prosynergy.org](mailto:leadership@prosynergy.org)

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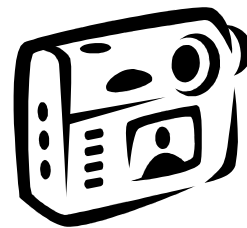


# Chapter 10: Rules to Run Meetings

(Parliamentary Procedure)

## SNAPSHOT

- What parliamentary procedures are
- How parliamentary procedures work
- Voting procedures



This is one chapter of a larger leadership manual called "Creating Change Together."



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Connections for  
Community Leadership  
[leadership@prosynergy.org](mailto:leadership@prosynergy.org)

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# Rules to Run Meetings

(Parliamentary Procedure)

Working together is fun but it can also be hard work. Many groups use rules to help things run smoothly. These rules help people share their ideas, make decisions, and run meetings.



**PARLIAMENTARY PROCEDURE** is a set of rules for running meetings.

Some groups use Robert's Rules of Order.

Robert's Rules help people talk to each other in groups and provide ways for the group to run smoothly. Groups can change these rules to meet their needs and help everyone understand.

## **Why Use Robert's Rules?**

The rules are based on several principles. These principles help groups make good decisions that are fair to everyone.

### **Fairness:**

All members have equal rights and responsibilities. Open discussion of every motion is a basic right.

- The majority has the right to decide.
- The minority has rights which must be protected.

Most issues are decided by a majority vote. Matters that affect the rights of the members must carry by a vote of at least two-thirds of the members.

The chairperson should be fair and impartial.

### **Clarity:**

The rule should help to clarify the issues that are being discussed and the precise proposals that are being decided in a vote.

Only one question at a time can be considered at any given time.

No member can speak until recognized by the chairperson.

### **Good Decisions without Wasting Time:**

The rules help the group spend enough time discussing a proposed action to make a good and fair decision.

At the same time, groups have a lot of work to do. Members have busy lives. The rules can help the group stay focused, spent time on the important issues, and make good use of people's time.

### **Rules for Small Boards and Committees:**



Robert's Rules are written for large meetings, like a national conference of delegates, a union meeting, or a convention. Big groups need more strict rules to be fair, be clear, and make good decisions. The rules for small board meetings are different from the rules which apply to large meetings. For details about some of the differences, see the "More Information" section at the end of this chapter.

## **What is a Motion?**

Every member gets to vote on ideas. The board may need to:

- Take an action.
- Take a stand on an issue.
- Approve something.



A **MOTION** is an idea that you want the board to decide about.

When you have something you want the board to vote on, you make a **motion**. You would say, "I **move that...**" and then say what your idea is.

Once you make a motion, someone must agree that the whole board should discuss it and vote on it. The person would say, "I **second the motion.**"

Once you make a motion and someone else seconds it, the members can discuss it. When discussion ends, the whole board will vote on the idea.

If more people say "yes" to your motion than say "no," then the motion **passes or carries**. This means that your idea was liked by most people and the board will take the action you suggested.

If more people say "no" than "yes," or the vote is a tie, then the motion is **denied or fails**. The board will not take the action you suggested.

### ***What if I Can't Remember the Rules?***

Sometimes it's hard to remember what to say with Robert's Rules – and that's okay.

Parliamentary procedure has fancy names for many of the rules. Some rules have fancy names that you hear quite often. The most common ones are:

- I move the previous question.
  - This means, "I move to end debate."
- I move that we table the motion.
  - This means, "Let's discuss this later."
- I move to amend the motion.
  - This means, "I want to change or improve the motion."

You do not have to remember the fancy name. You can ask for something in plain English. For example, you can say, "Please explain what that rule means." You don't have to know that it's called a "parliamentary inquiry." Or you can ask the



chairperson to have people raise their hands if you're not sure about the results of a vote.

## **Handling a Motion.**

### ***The steps for handling a motion are:***

1. Get permission to speak. (also called "getting the floor.")
2. A member makes a motion.
3. Another member seconds the motion.
4. The chairperson repeats the motion.
5. Discussion or debate by the group.
6. The chairperson puts the question to a vote.
7. The chairperson announces the vote and the result.

### ***1. Get permission to speak (getting the floor).***

Before a person can make a motion or speak in debate, he or she must obtain the floor. The member must be recognized by the chair. This gives the person the right to speak without being interrupted. Other members are to listen.

Small boards and committees have different ways to get the floor to make a motion. In some groups people raise their hand and are called on by the chairperson. In other groups, you just speak up when the previous person stops talking.

In larger bodies, a member addresses the chairperson to get permission to speak. You may need to stand or raise your hand and say something like, "Madame Chair," and then wait for her to respond. This is called receiving recognition of the chairperson.

If you don't know how it is done in your group, just watch the other people. You can get permission the same way that other people do.

Remember, you can only make a motion about a new topic when the group is not considering another topic.

### ***2. A member makes a motion.***

Business may be introduced by an individual member or by a committee. Business is always introduced in the form of a motion.

To make the motion you can say, "I make a motion to..." then say what you want people to vote on.

### ***3. Another member seconds the motion.***

A second means that someone else agrees that the group should talk about the motion. They do NOT have to agree with the motion.

You do not have to get the floor to second a motion. You can just say: "I second the motion."



#### 4. *The chair repeats the motion.*

After a motion has been made and seconded, the chairperson repeats the motion word for word. The chair states the motion so that everyone is clear what will be discussed. This helps make sure that the wording is correct.

#### 5. *Discussion or debate by the group.*

The members debate the motion if it is debatable, unless no one wants to debate it. Every member has the right to speak unless there is a motion to limit or end debate.

The president should ask the group, "Are there any comments?" Comments and discussion help everyone to understand what they are voting on.

The group also talks about the pros (good parts) and cons (bad parts) of the issue or idea to be voted on. All discussion needs to be about the specific motion that is being considered.

What if the members want to make changes to the motion?

- Someone can make a motion to amend the motion. The amendment must say exactly what is to be changed. Any member can second it.



An **AMENDMENT** is a change to something.

- You may only talk about the amendment, not the main motion, until the vote is taken on the amendment.
- What if the group needs more time to have discussions or gather information before they vote on an issue?
- Sometimes you may want to wait to talk about an issue at the next meeting. You can ask the group to do this by saying, "I move that we table this issue until our next meeting." Tabling means that people need more information or need their questions about the issue answered. A lot of issues and ideas get tabled because there is not enough time.
- Sometimes a small committee can help when an issue is too big for the group or the group needs more information on the topic. You can say, "I'd like to have a committee work on this." This is called a motion to "refer to a committee."

How does someone stop the talking?

- When there has been enough talking it's time to vote. Then someone can say, "I move we end the discussion" or "I move the previous question." If two-thirds (2/3) of the members agree, the talking is over. It's time to vote.



Moving the **PREVIOUS QUESTION** means you want to end the talking.



## ***6. The chairperson puts the question to a vote.***

- A. The chairperson restates the motion.
- B. The chairperson takes the vote:  
"All in favor of the motion, say aye."  
"Those opposed, say no."

People vote on an idea by either saying **yes (aye)**, **no (nay)**, or **abstain**. If someone abstains, it means that she or he is not voting.

Most votes require a majority to pass. The term "majority" means "more than half," excluding blank ballots or abstentions. Any motion which limits the rights of members requires a two-thirds (2/3) vote.

Any member can ask for a count by raising hands if there is uncertainty as to the true result of the vote. In a large assembly, a standing vote may be needed.

## ***7. The chairperson announces the result of a vote.***

A complete announcement should include:

- A. Report on the voting itself, stating which side prevailed (giving the count if a count prevailed).
- B. Declaration that the motion is adopted or lost.
- C. Statement indicating the effect of the vote.

For example:

- For a vote in which no exact count is taken, the chair might say, for example, "The ayes have it, the motion carries, and the brochure will be published."
- For a vote in which an exact count is taken, the chair might say, "There are 14 in favor and 15 opposed. The negative has it and the motion is lost. No additional funds will be spent on publicity this semester."







## *Examples of how Robert's Rules Work*

### **Example One: Voting on an Issue**

**The issue:** Public transportation isn't available when we need it.

**Sally:** I want to write a letter to the City Department of Transportation and ask them to make things better for us.

**Mario:** Great idea! I make a motion to have Sally write the letter for us.

**Andre:** I second the motion.

**President:** Are there any comments? What are the pros or cons?

**Dalia:** I think writing a letter is a great idea. A pro is that we would be able to say exactly what we want.

**Sally:** Another pro is that we can write to the director so our message is heard by the head honcho.

**Mario:** A con is that we wouldn't be able to talk directly with the director. But we don't have money in the budget to travel so writing the letter seems like the best idea for us.

**President:** Are we ready to vote?

**Everyone:** Yes.

Now the president guides the vote.

#### **Here are two ways of voting**

**Voice vote:** The president says, "All in favor of the motion say aye."  
Everyone one who agrees with the motion says "aye."

The president says, "Those opposed, say no."  
Everyone who disagrees says "no."

**Count of hands:** The president asks everyone who votes "yes" or "no" to raise their hands. Then he or she counts the number of hands for each vote.

The largest number of yes or no votes always wins.

**President:** The motion carries. Sally will write the letter.



### Example Two: Tabling the Issue

**The issue:** Public transportation isn't available when we need it.

**Sally:** I want to write a letter to the City Department of Transportation and ask them to make things better for us.

**Mario:** Great idea! I second writing the letter.

**The President:** Are there any comments? What are the pros and cons?

**Andre:** I'd rather have a meeting with the Department of Transportation in person. I think that would be more powerful than sending a letter.

**Dalia:** I'd like to meet with other chapters and to see how they are dealing with transportation issues.

**Sally:** Okay. Let's table writing the letter to find out more information.

**Mario:** Sounds good to me.

**Others:** Me too.

**President:** The issue is tabled until our next meeting. Let's remember to put it on the agenda for next time. Pass me the donuts!

When issues are tabled the officers make sure to put it on the agenda for the next meeting.

At the next meeting the president will bring the issue up for discussion and possibly a vote.



## Elections

An organization's rules normally give the date for elections, the method of nominating candidates, the procedure for voting, the votes required to elect, and the terms of office. In general, the following procedures are accepted:

- The chairperson opens the floor for nominations. For example, the chairperson might say, "Nominations are now open for the office of secretary."
- Nominations may be offered from the chairperson, from the floor, by a committee, or by write-in ballot. In some organizations, especially small groups, a person may nominate himself or herself. Nominations do not require a second.
- Nominations may be closed by the chairperson when it appears that no more nominations will be offered or they may be closed by a two-thirds majority vote. A motion to close nominations is in order only after a reasonable opportunity to make nominations has been given.
- Voting is usually done by voice, show of hands, by roll call, by ballot, or by "acclamation" (when only one candidate has been nominated). For example, the chair might say, "All those in favor of Ali for secretary raise their hands." The chair counts the votes for Ali. Then the chair says, "All those in favor of James, raise your hands." The chair counts the votes for James.
- The chair announces the result of the election. For example, the chair might say, "James has been elected secretary."

Never take a "no" vote. The chair should NEVER say, "All those opposed to James, raise your hands." This is true even if only one person is nominated.

A majority is necessary for a person to be elected. If more than two people are nominated, sometimes no one gets a majority. In that case, you vote again.

Sometimes a vote is taken between just the top two candidates. Robert's Rules says that you should not do that. The vote should be taken without eliminating anyone who was nominated.

There are exceptions that allow eliminating the other candidates. The bylaws can allow it or even say that the person getting the most votes is elected even without a majority. The other exception is called "suspending the rules." If at least two-thirds (2/3) of the members attending agree, then candidates can be eliminated. Or the person with the most votes, even without a majority, can be elected.



## **More Information on Boards and Committees**

### ***More Information – Rules for Small Boards and Committees***

The rules for small board meetings are different from the rules which apply to large meetings of assemblies or plenary bodies. In general:

1. Members are not required to get the floor before making motions or speaking, which they can do while seated.
2. Motions need not be seconded.
3. There is usually no limit to the number of times a member can speak. Motions to close or limit debate generally are not allowed.
4. Informal discussion of a subject is permitted while no motion is pending.
5. The chair can speak in discussion, make motions, and usually votes on all questions.
6. Sometimes, when a proposal is perfectly clear to all present, a vote can be taken without a motion's having been introduced. Unless agreed by general consent, however, all proposed actions of a committee must be approved by vote under the same rules as an assembly.

### ***More Information about Motions***

**There are three types of motions:**

1. Main Motions – the method of bringing specific pieces of business to the floor for a vote
2. Privileged Motions (undebatable) – may be introduced during the discussion of the main motion.
  - a. To fix time and place to which to adjourn
  - b. To adjourn
  - c. To take recess
  - d. To rise to a question of privilege
  - e. To call for orders of the day
3. Subsidiary Motions – may modify or dispose of main motions
  - a. To table
  - b. To call the previous questions (needs a 2/3 vote)
  - c. To limit the debate (needs a 2/3 vote)
  - d. To extend debate (needs a 2/3 vote)
  - e. To postpone definitely
  - f. To refer question to a committee
  - g. To amend
  - h. To postpone indefinitely

There are a lot of rules about these types of motions. For more information about them, see the Simplified Table of Motions, below or a full Table of Motions on one of the websites.



### **Some ways to amend a motion are:**

- Add words, phrases, or sentences.
- Take out words, phrases, or sentences.
- Replace words, phrases or sentences.
- Substitute whole paragraphs or an entire text.

Only two amendments (primary and secondary) may be pending on a main motion at any time.

**Withdraw a motion** – Before it is stated by the chair, the maker of the motion may withdraw it; after it is stated, he or she may withdraw it if no one objects.

### ***More Information About Voting***

There are several different ways to vote.

**Voice vote** – A vote by voice is the regular method of voting on any question that does not require more than a majority vote for its adoption. A voice vote is taken by calling for the ayes and nays.

**Division** – On a voice vote, when you think there is a question as to the result of the vote, you may call out “Division” or “I call for a division.” This means you want a rising vote so that accurate count can be made. Anyone may call for a rising vote or a ballot vote.

**Show of hands** – As an alternative to the voice vote or as a way to verify an inconclusive result, members show their vote by raising their hand. A vote by show of hands should be limited to very small meetings.

**Rising vote** – Used principally when a voice vote has produced an inconclusive result and as the normal method of voting on motions requiring a two-thirds vote, members indicate their vote by standing.

**Ballot** – Voting by ballot is used when secrecy of the members’ votes is desired. Voting by ballot is sometimes required in certain cases by the bylaws of an organization. Any vote relating to charges or proposed charges against a member or an officer should always be by ballot. Ask for a ballot vote if you feel that the members are more likely to express their real opinion if the vote is secret.

**Roll call** – A roll call vote has the effect of placing on record how each member votes. It should not be used when members are not responsible to a constituency.

**General consent** – When the chair believes that everyone is in favor of a motion she/he may say, “If there is no objection, we will dispense with...” or “If there is no objection, we will adopt...” If anyone objects, a vote must be taken.

### ***Bases for Determining a Voting Result***

**Majority vote** – The basic requirement for approval for action, except where a rule provides otherwise, is a majority vote. The term “majority” means “more than half,” excluding blanks and abstentions. If seven (7) people vote “yes,” six (6) people vote “no,” and 20 people abstain or don’t vote, the motion still passes. If five (5) people vote “yes” and five (5) people vote “no,” the motion fails.



**Two-thirds vote** – Two-thirds vote means at least two-thirds of the votes cast, excluding blanks and abstentions. Any motion which restricts the privileges of the members requires a two-thirds (2/3) vote; all others, a majority vote.

### ***More Information – How to Debate a Motion***

During debate, members must show respect for other members. Never attack another person.



**DEBATE** is talking about the good and bad points of a motion.

Remarks must be relevant to the question before the group. This means you need to stick to the topic or issue.

Thomas Jefferson's advice is still good: "No one is to disturb another in his speech by hissing, coughing, spitting, speaking, or whispering to another, etc."

Note that more formal rules apply to large meetings, and even some boards and committees.

- A member may not speak until recognized by the chair.
- Remarks should be addressed through the chair.
- Speakers should stand when speaking.
- When no special rule relating to the length of speeches is adopted by the group, a member can speak no longer than ten minutes unless the consent of the group is obtained.
- Rights in debate are not transferable. A member cannot yield an unexpired portion of his/her time to another member (the chair controls who speaks) or reserve any portion of time for later.
- No member may be allowed to speak more than twice to the same question on the same day.
- If any member objects, a speaker has no right to read from or to have the secretary read from any paper or book as part of his/her speech, without permission of the assembly.

### **Another Way to Talk About a Motion in a Small Meeting**

- You may want to use something like a **talking stick**.
- A talking stick is used by Native Americans to remind the group to listen to the person who is speaking.
- When a person holds the stick, he or she is the only one talking.
- It's also a symbol that reminds the group of the rules.
- The stick starts with the president.
- When other members want to speak they can raise their hand to get the stick passed to them. Then, the vice president passes the stick around to people who want to speak.



## Brief Table of Motions

Parliamentary Action	Other Notes
<p><b>1. Main Motion</b> This is the primary proposal before the assembly. It is used to introduce new business</p>	
<p><b>2. Postpone Indefinitely</b> Proposes that the assembly does not wish to take a position on the main motion before it. It is in order only when the main motion itself is under consideration. No other motions, such as to amend or to refer, may be on the floor.</p>	Not amendable
<p><b>3. Amend</b> This changes the motion before the assembly. Be sure to state exactly what is to be added, deleted, or substituted with precise wording. It helps if written copy is given to the secretary.</p>	
<p><b>4. Refer</b> (Also called "commit.") If the assembly thinks that it does not have adequate information, or if excessive time is needed to refine the motion, it may be referred to a particular group for this work. The motion to refer should clearly state two things:</p> <ol style="list-style-type: none"> <li>the person or group to which it is referred, and</li> <li>what that group is to do: report back at a certain time, act as it sees fit within specified limits, or act or not act as it feels is wisest.</li> </ol>	Debate is limited to advisability and details of referral
<p><b>5. Postpone to a Certain Time</b> This can be done for three purposes:</p> <ol style="list-style-type: none"> <li>time to develop support;</li> <li>time to develop more information;</li> <li>to take up another matter before present business.</li> </ol>	
<p><b>6. Limit or Extend Limits of Debate</b> Any limit can be set on the length of speeches, the number of speakers permitted, or the total time of discussion. This is used when there are abuses or when time is short and there are other matters to deal with.</p>	Not debatable Requires 2/3 vote
<p><b>7. Previous Question</b> This stops debate and calls for an immediate vote. The chairperson is justified in ruling it out of order until both sides have been well expressed. When the discussion begins to be repetitive it can be helpful. Specify the motions to which previous questions apply.</p>	Not debatable Not amendable Requires 2/3 vote
<p><b>8. Lay on the Table</b> Has the effect of setting the matter aside temporarily because something more urgent has come up. Matters laid on the table remain there until taken from the table. Any matters on the table at the end of the assembly die. It is not in order to table an item to defeat it.</p>	Not debatable Not amendable
<p><b>9. Question of Privilege</b> This takes precedence over all other matters to enable a delegate to deal with a problem of (a) comfort, (b) safety, (c) courtesy, (d) effective working of the assembly. It is out of order to mention any other issue after using this emergency measure to gain the floor.</p>	No second required Not debatable Not amendable Requires chair approval, not voted on



<p><b>10. Object to Consideration</b> This is appropriate only when it is thought that discussion would bring disrepute, embarrassment, or unwarranted divisiveness to the assembly or a member. If you are merely opposed to a motion the proper procedure is to speak against it and seek to vote it down. This move must be made immediately after a question has been moved, seconded, and announced by the chairperson, but before debate begins.</p>	<p>No second required Not debatable. Not amendable Requires 2/3 vote</p>
<p><b>11. Parliamentary Inquiry</b> This is a question about parliamentary procedure in the action before the assembly at the time. The chairperson's answer is an opinion only and cannot be appealed.</p>	<p>No second required Not debatable Not amendable Chair answers the question</p>
<p><b>12. Point of Order</b> This is appropriate if you think that business is progressing contrary to: a. parliamentary rules of the assembly, b. the organization's by-laws, or c. normal standards of courtesy or propriety.</p>	<p>No second required Not debatable Not amendable Chair rules</p>
<p><b>13. Appeal.</b> If you think the chairperson has ruled incorrectly on a matter, you can appeal to the assembly. The chairperson has the right to enter into the debate on the appeal.</p>	<p>Debatable if applied to a debatable issue Not amendable</p>
<p><b>14. Division of the Assembly</b> This is a call for a recount with a standing vote. It must be moved before another motion is announced by the chairperson.</p>	<p>No second required Chair takes the recount if someone requests it</p>
<p><b>15. Request for Information</b> Use when you wish to speak to a report or need additional clarification or information in order to make an informed decision. Do not use this request to debate an issue.</p>	<p>Not debatable Not amendable Chair designates someone to answer</p>
<p><b>16. Reconsider.</b> Brings before the assembly a motion that has previously been acted upon. Can be moved only by a person who previously voted on the prevailing side. Secunder can have voted either way. Can be raised only on the same meeting or the meeting following original vote.</p>	<p>Debatable if the original motion was Not amendable</p>
<p><b>17. Suspend the Rules</b> If you think parliamentary or administrative rule of the assembly interferes with the progress of business, you can move to suspend the rule. Examples might be to change time of meeting, suspend rule of alternates, or give an honored person the floor. Bylaws cannot be amended this way.</p>	<p>Not debatable Not amendable Requires 2/3 vote</p>
<p><b>18. Division of the Question</b> If there are two or more items in a motion that can be accepted or rejected individually, this motion can be used. If it passes, the question will be voted on by its divisible parts, not as a whole.</p>	<p>Not debatable</p>
<p><b>19. Take from the Table</b> Brings before the assembly a previously tabled motion. A question laid on the table stays there until taken from the table or until the end of the next regular meeting. If not taken up by that time, the question dies.</p>	<p>Not debatable Not amendable</p>

For more information and a complete table of motions, go to either of the websites listed on the following pages.





## **More Information on Parliamentary Procedures**



### **Parliamentary Procedure: Toward the Good Order of the University**

[www.csufresno.edu/comm/cagle-p3.htm](http://www.csufresno.edu/comm/cagle-p3.htm)

Includes information on making meetings work, basic principles, handling motions, voting, rules governing debate, minutes, a table of motions, and much more.

Website author Cagle states, "This website is provided as a community service. The homepage provides basic instruction on important topics in Parliamentary Procedure, an opportunity to ask a real Parliamentary questions, and a link to questions and answers I have received and given. I have tried to make this a user-friendly environment. This homepage contains all the instructional material and while it takes longer to load, moving from place to place within it is easy and quick."

### **Parliamentary Procedures at a Glance**

<http://www.csuchico.edu/sac/studentOrganizations/parliamentaryProcedures.shtml>

California State University, Chico  
Student Activities Office  
Bell Memorial Union 213  
Chico, CA 95929-755  
(530) 898-5396

This website includes information on parliamentary procedures, parliamentary terms, examples of motions, handling motions, committees, elections, tips on parliamentary procedures, and other topics not covered in this chapter.



United Cerebral  
Palsy of Michigan  
[ucp@ucpmichigan.org](mailto:ucp@ucpmichigan.org)

Connections for  
Community Leadership  
[leadership@prosynergy.org](mailto:leadership@prosynergy.org)

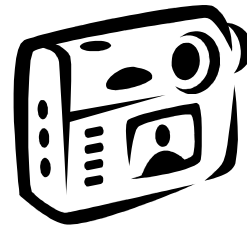
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# Chapter 11: Talking to the Media

## SNAPSHOT

- How to talk to reporters
- How to write a press release
- Editorial board visits



This is one chapter of a larger leadership manual called "Creating Change Together."





## Talking to the Media

The media can be a great low cost way to get your story out into the public. Messages can include many things such as the importance of public transportation, who your group is and how people can get involved, or issues that people are facing in your community.



**MEDIA** is a way of communicating such as newspaper, radio, and television.

### Creating a Media Kit

A media kit is a way to organize key information that you may want the public to know at some point. It is also a way to keep track of when and how you have used the media in the past.

Your media kit should include:

- Any brochures, pamphlets, and talking points explaining your objectives or goals.
- A strategic plan, if you have one, along with any news articles or feature stories about your group or issue of concern.
- A list of your group members.

A few tips for using your media kit:

- Know where you have made presentations; keep a list and a count of the material you have left with people.
- Keep some photos in a digital format to email to newspapers and other reporters.
- Always carry it with you. Never be without your information.

### Presenting Your Message

The media is an important audience that needs a consistent message. Reporters, columnists, and editorial writers are important people to have on your side when advocating. The more information you give them, the more opportunity for fair coverage. Remember, what they do not know can hurt you. You want to make sure they know everything.

The following points may be helpful when talking to the public, whether it is through a letter to the editor, a TV appearance, or a written brochure:

- Identify yourself and where you live.
- Identify your group.
- State your reason for writing/presenting. Explain how the issue affects you and those around you. Tell your story.



- Identify the issue you are concerned about. “How can it be made better?”
- Clearly state what you are trying to do.
- Give good local examples that people can relate to.
- Refer to research, data, statistics, etc.
- Be reasonable, specific, and positive.
- Thank them for their time and attention.
- Sign/present your full name, organization, and leave a phone number or an email address so people know how to get in touch with you.

The following tips will help you feel comfortable in talking to the media.

### **Things Reporters Look for**

**Story:** A way to easily talk about information is to give them a story. This is a way to make sure your meaning and points get across. By avoiding technical jargon and using easy-to-understand language, your story becomes of interest to the media.

**Flavor:** Reporters are looking for ways to liven up the story. Adding flavor, such as describing surroundings, makes your story more likely to be selected for media coverage. Your appearance and demeanor are important as well.

**A good scoop:** Be careful talking off the top of your head with reporters, even if it has nothing to do with the current story. Some reporters will use that information at a later date. You want to stick to the story and only the story. It is also helpful to have an outline or a list of key points in front of you when talking to the media.

**Access:** One way to get reporters on your side is to be accessible. This means being available for them and even being willing to come talk to them on short notice.

**Focus:** You do NOT want to tell a reporter or editor what the focus of the story should or should not be. Telling the reporter what to focus on instantly sends up a red flag, not to mention that it insults their integrity.

### **Reminders**

**Be a source before you are a subject:** The time to make friends with reporters is long before the issue or trouble comes up. Get to know the people who cover your issues now. Help educate them, help them with their stories, and give them a reason to respect you.

**Respond fast:** You cannot influence a story after the deadline has passed. In addition, it will not look good if you are late all the time. During a crisis, you have less than a day to get your message out. During routine stories, the sources who respond late often will be ignored. It is important to respond immediately!



**Be human:** Reveal yourself as a person with feelings and be honest. Your mistakes will be less criticized and more likely to be forgiven. It is okay to show your emotions and it is good to do so, but be careful not to show too much emotion. For example, it's okay to sound a little upset, but we would not recommend yelling and screaming.

**Do not expect to have every story in the media:** You are not going to get every story published in the media. There will be many times when your story is not chosen for publication, but don't give up. Keep your head up and keep swinging – eventually you will score.

### **Tips for Getting the Media's Attention**

- Use pictures and other visuals
- Have access to local people
- Controversial positions on issues
- Kids and/or animals are part of the story
- Major financial commitment or loss to the community
- Easy access
- Good timing and timelines
- Personal contact – make relationships
- Unusual stories
- Celebrities
- Piggyback on a national/statewide story
- Be objective

### **Some Potential Story Ideas**

- Invite your legislator(s) for a meeting with your organization/group. Invite the media/a reporter to tag along.
- Issue a news release each time you or your organization/group accomplishes something or has a story that would be of interest to the community.
- Recognize an "Advocate of the Year" and issue a news release. Have a party for them and invite the media.
- Note milestones by issuing news releases such as the 10<sup>th</sup> Year Anniversary, a new record for number of consumers served, etc.
- Announce when a new member joins your board and recognize good board members when they leave.
- Announce successful and generous donations and fundraising drives.

### **Compiling a Good Media List**

It is a good idea to have a list of your local media contacts on hand so when the time comes, you are ready.

**Compile a good media list that you update at least once a year.** Get the telephone number, fax number, and email address for each media organization.



It is also helpful to have the deadline details listed for each media organization. The list could include:

- All weekly and daily newspapers that serve your area. Include the business editor, health editor, social editor, and social services reporter.
- All local business publications. Include the name of the editor and the publisher (ex: Crain's Detroit Business, Greater Lansing Business Monthly, Grand Rapids Business, etc.).

**Get to know your local media.** It is important to form relationships with the media in your area. You want to get to know your local media well before you have a story to pitch.

- Set a goal of getting to know one reporter or editor a week until you've covered your area's media list. Pick up the phone and schedule a meeting with them.
- If you have a story to pitch, by all means do it at the meeting – even if it is the first meeting. However, remember that the main goal of your first meeting is to form a relationship with the reporter/editor.

### **What to Do When a Reporter Calls**

Sometimes, reporters will call you when you are the least prepared. No matter what the topic is, you want to be as ready as possible. Here are some suggestions of what to do in the first hour after a reporter calls, no matter what the story is about:

- **Who** is calling?
  - Get a name, title, and name of media source.
- **What** do they want?
  - What are they calling about?
  - Who else are they talking to?
  - What do they already know?
  - What do they want from you? Comments, confirmation, background, etc.?
- **When** do they want it?
  - Do they have a deadline? If so, when is it?
  - Do they want to talk in person, live and on the air or on the phone?
  - When do they want to talk to you?
- **Where** are they talking about?
  - Know the exact location of the area they are calling about.
  - Know exactly where you are to meet the reporter for an interview.
- **Why** are they calling you?
  - Anticipate all questions.
  - Why has the reporter been referred to you or your organization?
  - Who suggested they talk to you?





- Who else have they talked to?
- Who else should they talk to?
- **How** do you respond to their request?
  - Know all the facts about the issue/event.
    - What is the responsibility of yourself or your organization?
    - What have you and/or your organization done to date? When was it done?
    - What will you and/or your organization be doing in the future?
    - Are there any other groups or people involved?
  - Designate a spokesperson.
  - What are your key messages?
    - Hang up the phone and develop the message **BEFORE** talking with the reporter about the issue at hand.
  - What are your long-term strategies?
    - Once you've called the reporter back, you may be done – but you may also **NOT** be done.
    - Do you need longer-term strategies to deal with the event/issue?
    - Who will do these strategies?
    - What is the timeline?
    - Do you need outside help in implementing the strategies?

### **Things to Remember**

- Return every phone call within the hour – or when you told the reporter you would.
- Be prepared before you open your mouth. If you don't know the answer or you are unsure how you want to answer, tell the reporter you are busy at the moment or that you have to make sure you have all the information and that you will call them back at a determined time. Reporters are always on deadline, so make every effort to accommodate them.
- Know your facts and stick to them.
- Avoid sarcasm.
- Be brief. Get your key message across early.
- Know when to stop talking.
- Tell the truth.
- Keep your cool. Act, don't react.
- Think – and talk – visually.
- Be positive, not negative.
- Speak in simple language – not technical jargon.
- Build bridges from loaded questions to informed answers.
- Repeat your key messages before you conclude.



- Never say “no comment.” You can always say something – without really saying anything – about an incident or situation that communicates something positive about you or your organization without saying, “no comment.”

### **Follow-Up Steps**

- Read the clips and watch the newscasts when they are published. Be critical of your performance.
- Check your quotes – are they accurate or inaccurate?
- Make corrections, if necessary.
- Commend accuracy.
- Follow up in writing.
- Make sure all correspondence on an issue is consistent.
- Send copies of good stories – or even bad stories that support your messages and goals – to your policymakers/elected officials and other people you know such as the governor’s office, members of your group/organization, businesses, etc.

### **Media Advisories**

The purpose of a media advisory is to tell the media about an event that they should cover. The goal is to give them just enough information to get them there and to cover the event.



A **MEDIA ADVISORY** is a way of telling the media about an event you want them to cover.

Some key rules about media advisories include:

- No longer than one page.
- Looks better on an organization’s letterhead.
- Put the words, “Media Advisory” at the top.
- Distribute it to media that would be interested in the event (local, statewide, or national).
- Distribute the release by fax at least 24 hours before the event. Then follow-up with a personal phone call to make sure it was received.
- Follow-up with reminder calls the afternoon before a morning news conference and the morning before an afternoon news conference.
- Include relevant information such as who, what, where, why, when, and how.
- Include the name and phone number of a contact person who will be available to answer questions.

### **Press Releases**

Press releases provide all relevant details about your newsworthy event or issue. Press releases are always handed out to reporters at news conferences, but can



also be distributed without holding a news conference. This would be done by fax – the preferred method – or mail or email at least 24-72 hours in advance.



A **PRESS RELEASE** is a way of telling the media all about the details of your event or issue.

Each news organization has its own rules for press releases, so be sure to check with them before submitting your press release. Some general rules about a press release may include:

- It should be no longer than 2 or 3 pages, double-spaced
- It answers, in detail, all questions such as who, what, where, why, when, and how.
- It includes quotes.
- It includes your key message and relevant secondary messages.
- It should be done in 12-point font type, preferably Helvetica or Geneva font style.
- Distribute it to your local daily and weekly newspapers; local TV stations; and local radio stations with local news programs.
- Make sure to fax, mail, or email the release to a specific individual. Take the time to call and verify names and titles.
- If you fax or email the press release, be sure to follow-up with a phone call to make sure they received it.
- Call reporters/editors – ask to speak to the reporter who is covering the story to see if they have any other questions.
- Use only supportable facts. Localize the issue.
- Be certain the person you list as the contact on the press release is available to take the calls and able to talk about the issue/event.
- Be certain to put # # # centered at the bottom of the last page. This tells the reporters that the release ends there.

### **Letters to the Editor**

Letters to the editor are written in response to an issue in the news or coverage of an issue.



A **LETTER TO THE EDITOR** is written by readers of a newspaper who want to respond to an issue in the news or how an issue was covered in the news.

For example, the local newspaper may publish an article on the transportation millage. You may choose to write a letter to the editor supporting or opposing the millage.

Each newspaper has different rules about these letters such as how many words it can be. Be sure to check with the local newspaper organization before submitting your letter.



## **Viewpoint/Opinion Columns**

Most daily, and many weekly, newspapers publish letters to the editor that are longer than usual. These are known as “viewpoint” or “voices” columns and are usually published on the “op-ed” (opinion editorial) pages. These columns are written by readers who want other readers to know their views on important issues or event.



A **VIEWPOINT COLUMN** is written by readers of a newspaper who want other readers to know their views on issues or event.

Viewpoint columns are excellent tools for reaching legislators and political leaders because they tend to pay close attention to newspaper editorial and opinion pages. Viewpoint columns may be written in response to good or bad editorials in the paper, in response to other viewpoint columns, in response to stories published in the paper, or just to let readers know about important events or issues that affect the community.

Here are some general guidelines for preparing a viewpoint column:

- The length of the column should be 500 to 700 words (make sure you indicate the number of words in the upper left-hand corner of the first page). It is always smart to find out what your paper requires before you start writing.
- Many papers require a black and white “head and shoulders” or “mug shot” – photograph of the writer. Some papers will not run the piece without a photograph, so be certain to send one along. Find out what your paper’s requirements are regarding photographs.
- It should be timely. If you are writing about an issue that will face a vote in the legislature, be sure to send your column at least ten days in advance of the vote. Make sure your viewpoint makes it clear that the issue is time sensitive.
- It should be sent to all key daily and weekly newspapers in your area. You can also send it to newspapers in the districts of legislators who sit on the committees that will consider your issue.
- It should be localized. In other words, it should tell the readers in the newspaper’s community as specifically as possible why the issue is important to them.
- It should include your name as the by-line and one or two sentences of biographical information about you at the end.
- It should include your key messages.
- It should include a call to action. Be sure to tell readers what you want them to do, such as “Tell Rep./Sen. \_\_\_ to vote ‘no’ on Bill #\_\_\_.”
- It should be mailed to the attention of the newspaper’s editorial page editor. Call the paper if you are not sure who this person is.



## *Examples*

### **SAMPLE MEDIA ADVISORY**

Rep. \_\_\_\_'s bill will help people trade welfare checks for pay checks.

- WHO:** State Rep. \_\_\_\_ Your town member, Michigan House Appropriations Committee
- WHAT:** News conference announcing legislation to enable Michigan to capture all federal vocational rehabilitation job training funds for which the state is eligible.
- WHEN:** 10:00 a.m. – Tuesday, January 16, 2007.
- WHERE:** Room 402/403 – State Capitol
- DETAILS:** Rep. \_\_\_\_'s proposal would enable Michigan to collect all Work First support funds for which the state is eligible. Currently, the state is not matching all available funds, which are used to help people with disabilities and others with barriers to employment, get the skills, training, and supports needed to get full-time jobs. Joining Rep \_\_\_\_ at the news conference will be people with disabilities who have jobs today thanks to the funds along with representatives of agencies that help Work First people remove barriers to employment.
- CONTACT:** Rep \_\_\_\_ @ (517) 373-0000  
Your name, organization, and telephone number

# # #



## SAMPLE PRESS RELEASE

**For Immediate Release**  
Jan. 28, 2007

**Contact:** Linda Potter, Executive Director  
(517) 203-1200

### **Photos help people with mental illness remove stereotypes**

With the help of a new program from **United Cerebral Palsy of Michigan**, **Roger Boston** and others are making important strides in their recovery from mental illness. As part of **Life in Focus**, a project that helps people with physical and mental disabilities advocate for change using photography, Boston is thanking those who have helped him and also is trying to remove the stigma that comes with mental illness.

"I want to let people know that there is help available," says Boston, who has been taking pictures of the numerous doctors and therapists who have aided him in his 15-year recovery. "And if people don't speak up about their mental illness, it's not going to help remove the stereotype."

Boston, who lives in Alpena, has joined other members of an anti-stigma campaign called "Faces of Recovery." North Country Community Mental Health, based in Petoskey; Northeast Michigan Community Mental Health, based in Alpena; and Tawas City-based Au Sable Valley Community Mental Health have teamed up for the effort, whose participants are drawn from 13 counties. Faces of Recovery is supported by funds from the federal Substance Abuse and Mental Health Services Administration's Center for Mental Health Services. The campaign uses the Life in Focus program, which puts cameras in the hands of people with disabilities to document their lives and become advocates for themselves. For some, it was the first time they used a camera.

— more —



“This project gives people with disabilities the confidence to share their stories with the people in their lives,” says **Glenn Ashley**, Life in Focus coordinator at UCP Michigan.

The program focuses on three key questions for participants: What is good about your life? What do you think needs to change? What issues are important to you? Members are then asked to take photos to find and illustrate answers to those key questions.

**Joanne Rackow** of North Country Community Mental Health says the use of photography has greatly helped participants in their recovery.

“They are looking at what’s important in their lives, and it is reminding people how far they have come,” Rackow says. “It puts things in focus in their recovery.”

For Boston, he knows how far he has come. Before he began his recovery, his contact with family members was strained.

“Now my family members are all behind me and very understanding,” he says.

As part of Mental Health Month in May, members of the Faces of Recovery campaign will publicly display their photographs at sites across northern Michigan and some will take part in the Walk a Mile in My Shoes rally in Lansing.

UCP Michigan trains local organizations to sponsor Life in Focus groups. Those sponsors then recruit members to participate. The project is funded through a grant from the Michigan Developmental Disabilities Council. UCP is working on training more groups throughout the state, Ashley says.

UCP Michigan is a statewide association that promotes the productivity, independence, and full citizenship of people with cerebral palsy and other disabilities. Cerebral palsy is the most widespread lifetime disability in the United States. More than 35,000 Michigan citizens have cerebral palsy.

###



## SAMPLE LETTER TO THE EDITOR

### Back entry bill

The March 23 Viewpoint on Single Point of Entry is timely. When my mother needed long-term care support, I could negotiate the maze of services because I participated in the Long-Term Care Task Force. I had privileged access to professionals in the aging community. I cannot imagine making difficult decisions without that support.

House Bill 5389 will create single points of entry to long-term care services for everyone: those dependent on public support and those who pay privately. Everyone will have access to information to find the services and supports they want and need.

Unfortunately, some business providers are opposed to the bill. They would rather keep the public ignorant of available options so that long-term care continues to mean nursing facilities. This is not good for our grandparents, our parents, or us. It is not good for Michigan taxpayers. Support HB 5389.

Carolyn Lejuste  
Lansing

## SAMPLE LETTER TO THE EDITOR

### Pass entry bill

Michigan needs a Single Point of Entry system that would provide "one-stop shopping" for long-term care needs. Thirty-two other states and the District of Columbia have already implemented SPE programs.

Michigan House Bill 5389 would create such a system here.

Opponents have spread misleading information about the legislation. Reginald Carter, president of the Health Care Association of Michigan ("Don't rush into entry system," April 14), asserts the state should first complete an SPE pilot project before passing enabling legislation. But the truth is, passage of HB 5389 now is essential so that consumers in certain areas will be required to use an SPE pilot project to access Medicaid.

Creating an SPE system is a core recommendation of Michigan's Medicaid Long Term Care Task Force, whose deliberations included every provider group. To spread misinformation now is disingenuous and a disservice to Michigan's citizens.

Steve Gools  
Michigan State Director  
AARP





## SAMPLE LETTER TO THE EDITOR

### Push entry plan

In his April 14 Viewpoint (“Don’t rush into entry system”), Reginald Carter makes a good point regarding funding for creating Single Point of Entry systems. Yes, Michigan is in a budget crisis and yes it may take more than \$60 million to implement SPE agencies.

However, the fiscal analysis of House Bill 5389 shows \$36 million would be transferred from existing Home Help and MI Choice Waiver funds, leaving \$30 million to be funded by the state. Also, this analysis shows SPEs would save approximately \$40.1 million if the nursing home average census was reduced by 2.9 percent (880 people) – an outcome that is consistent with the SPE approach in other states.

It has been shown that when given a choice, more people will choose home- and community-based service. It is reasonable to expect the SPE system will pay for itself and possibly save money.

Kathryn Wyeth  
Holt

## SAMPLE LETTER TO THE EDITOR

### Support millage increase

The State Journal missed the most persuasive argument for voting "Yes" for the CATA millage increase. In these times of layoffs and foreclosures, people need CATA services more than ever. The proof is in the dramatic increase in the number of riders. At the current rate, there will be over 11 million rides this year. The 10 million riders last year was an increase of 7.2% from 2005. In addition, when people take the bus they are either going to earn money or spend money. This strengthens the local economy. The greater Lansing community needs CATA and needs to support the funding for this valuable service.

Glenn Ashley  
Lansing



## SAMPLE VIEWPOINT/OPINION COLUMN

### Single Point of Entry is a must for Michigan

When it comes to long-term care options, older adults enter a maze that can often be impossible to escape. The current long-term care system is fragmented and disjointed, with many public and private programs and services – personal care, self-directed care, homemaker, assistive devices, home adaptations, home delivered meals, chore services, respite services, transportation, assisted living, nursing home care ... the list goes on.

To make it even more confusing, these services are delivered by a large array of agencies and organization. Older adults themselves sometimes have to navigate a system that requires them to coordinate several disparate financing and delivery systems.

This can cause major confusion for older adults and family members, leaving them unaware of many of their options and unable to make an informed choice about their long-term care services.

So you may ask how do we provide them with the information they need? It's simple – create Single Points of Entry (SPE). An SPE is a system that enables consumers to access long-term and supportive services through one agency or organization. SPEs perform several functions including:

- Providing consumers with information on and referral to all long-term care options, services, and supports.
- Assisting consumers in obtaining a financial determination of eligibility for publicly funded long-term care programs.
- Facilitating movement between supports, services, and settings.
- Assisting consumers in obtaining a financial determination of eligibility for publicly funded long-term care programs.
- Assisting consumers in developing their long-term care support plans through a person-centered planning process.
- Re-evaluating consumers' need and eligibility for long-term care services on a regular basis.
- Working with consumers in community settings to assure they are presented with a full array of long-term care options.

Currently, 32 states and the District of Columbia are operating 43 SPEs across the nation, but Michigan has yet to jump on the SPE bandwagon. However, House Bill 5389 has been introduced. This legislation would promote and establish Single Point of Entry services in Michigan. The bill was referred to the Committee on Senior Health, Security, and Retirement and will be voted on soon.

It is imperative that older adults have information regarding all long-term care options that are available to them. This allows them to make an informed choice – a choice that reflects their wants and needs.

Older adults should be in charge of their lives – in charge of how they spend their older years. The establishment of SPEs will give them the information needed and allow older adults to choose the long-term care services they desire. Michigan is behind the times and it is about time they get up to speed. SPEs in Michigan are a must! Do what is right and support HB 5389. They have earned it!

Melinda Haus-Johnson  
Laingsburg



## **Editorial Board Visits**

There comes a time during many issue and political debates when editorial board visits become good and necessary.



An **EDITORIAL BOARD** is a group of people who determine the opinions and positions that a newspaper makes on important issues.

A newspaper's editorial page is where the paper expresses its opinions and positions on important issues or events. The paper's opinions and positions are determined by the paper's editorial board, generally a group of high-ranking editors and executives. The editorial board may include the publisher, the editorial page editor, the editor-in-chief, the managing editor, and the staff of editorial writers. The larger the paper, the larger the editorial board. At small papers, the editorial board may be no larger than one or two people.

### ***Who reads editorial pages?***

Editorial pages are read largely by community and opinion leaders, readers with higher levels of education, business leaders, activists, etc. – people who are most able and likely to help or hurt politicians. As a result, elected officials pay attention to editorial pages.

### ***Who visits editorial boards?***

Some political organizations take full advantage of editorial page opportunities. They know the editorial boards that tend to support their positions and they ask for help when issues are "hot." They also know which editorial boards are likely to oppose them, so they can prepare appropriate measures to respond – such as letters to the editors.

### ***How do you get – or at least ask for – an editorial board's support?***

Some editorial pages will always take a "liberal" or Democratic position on issues, while others will always take a "conservative" or Republican position.

When you meet with an editorial board, your goal will either be to win its support or to neutralize/tone down its opposition. Influencing an editorial board begins with a phone call and a meeting. Following is a step-by-step guide for successful meetings with local newspapers in your community.

#### **1. Scheduling the Editorial Board Visit**

Personally call the editor of your local newspaper to set up a time when you and one or two other key supporters can come in and meet with the editor, a reporter, and an editorial writer.



The editor will ask you why you want to meet, so you must be prepared to give a brief explanation of your issue, your position, and why it's important to the local community.

NOTE: Some editorial boards meet at various times, while others have a set and firm schedule. You must accommodate the paper's schedule.

## 2. **Deciding Who Should Attend**

No more than four people should attend the meeting. The group should include an agency official or two, a business customer, and a consumer – some mix of people that shows broad support for your issue.

## 3. **Confirming the Meeting**

It is always a good idea to send a letter to the editor confirming your meeting. This gives you the opportunity to outline your goals, confirm who will be joining you, and confirm representation from the paper.

## 4. **Preparing for the Meeting**

Be prepared for this meeting – it may be your only chance to help share information with the paper and encourage their appreciation of the situation. Decide who is going to talk about what in advance of the meeting. Review your key messages before going to the meeting.

## 5. **Leading the Meeting**

You asked for this meeting, so the newspaper folks will expect you to take the lead. Don't be shy – you've got a story to tell, so tell it:

- This is your show, so be prepared to lead. Some editorial boards will expect you to make formal presentations; others will conduct the meeting as a rather informal conversation. Be prepared for both scenarios.
- Thank the editor and the other people attending for joining you and taking time out of their busy day to learn more about the issue.
- Introduce your representatives – first and last names, titles, and explain why they are there with you.
- Briefly review the purpose of the meeting. These are your key messages – you'll be repeating them several times to get your point across and keep it across.
- Launch into your key messages with visible examples from your own community.
- Let all parties speak – you might take turns or each take a key message.
- End this portion of the discussion by repeating your key messages.

## 6. **Fielding Questions**

You will most likely be asked several questions during and/or after your presentation. Don't duck a question – if you don't know the answer, just say so –



but with a promise to get back to them with the answer (and then make sure to follow up with the information as soon as you get back from the meeting).

#### **7. Deliver Your Call to Action**

The editor may very well say something like “this is very interesting, but just what do you want us to do about it?” Simply ask them to take the action you want them to take – “Urge the Legislature to pass/kill the bill.” “Ask the governor to include more funding in the budget.”

#### **8. Closing the Meeting**

Thank the newspaper staff for their time, their questions, and their own insights. Make sure they know who to contact for follow-up stories. Leave business cards or contact information and any other relevant documents you have with everyone from the paper.

NOTE: It is important to have “leave-behinds” – fact sheets, letters to the editor, reports, etc. that support your position that you can leave with the newspaper’s representatives.

#### **9. Following up on the Meeting**

It is extremely important to follow up on the meeting with any information that may have been requested, additional contacts, etc. Also, send a thank you letter to each individual. Keep all informed as to the outcome of the meeting. If you promised to advise the paper of upcoming activities, do it. If there is any activity on the issues, advise the editor and reporters.

Likewise, keep an eye out for the way the paper covers this issue from now on. Are they doing a good job? If so, let them know by a phone call to the editor and reporter, or a letter to both thanking the paper for the accuracy of the coverage. If they are not covering the issue, give them ten days to two weeks, then call them again to jog their memories.

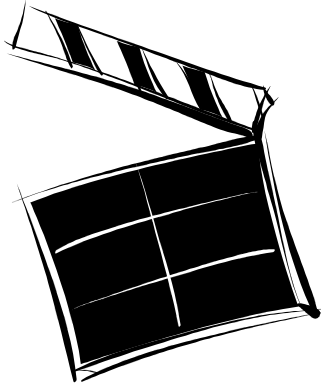
Remember, the key here is to keep this door open – do not let it close after one meeting. You will most likely be contacting them again, so do not let the door swing closed now that you have worked so hard to open it.



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Connections for  
Community Leadership  
[leadership@prosynergy.org](mailto:leadership@prosynergy.org)

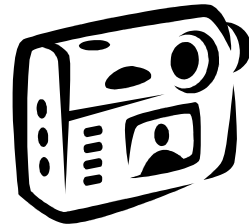
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# Chapter 12: Get Involved!

## SNAPSHOT

- How you can get involved and be a leader in your community



This is one chapter of a larger leadership manual called "Creating Change Together."



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Connections for  
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## Get Involved!

Now that you have read all about advocacy and leadership, it is time to put it into action! There are several ways to get involved. Here are just a few that are part of this manual:

- Stand up for your rights and the rights of other people.
- Practice being assertive when you talk to people.
- Treat other people with respect.
- Attend advisory committee or governing board meetings of agencies that revolve around what you are advocating for.
- Find out how to join that committee or governing board.
- Learn as much as you can about the issues that are important to you.
- Write and talk to elected officials and decision makers about how important your issue is to you. Ask them to take action on the issue.
- Talk to family, friends, neighbors, and other community members about how important your issue is to you.
- Join an advocacy group that is dealing with your issue in your community.
- Start a group with other people who also want to work on your issue.
- Create your action plan and develop your own way of advocating for your issue.
- Develop an action plan in your group.
- Go to public hearings that are related to your issue.
- Vote.
- Get the media involved in your issue.

**REMEMBER:** Change takes time!!! Don't get discouraged. Learn from your mistakes. Just regroup and try again. If you fall off the horse, just jump back on and keep on riding.



**TIP:** To keep your spirits up and to stay motivated, it is important to celebrate all victories, even ones that seem small. Order pizza, throw yourself a party, write a press release.

