

ADVOCACY AND ACCOUNTABILITY AT CITY HALL

A PLAYBOOK FOR CITIZENS AND COMMUNITY GROUPS





CONTENTS

OVERVIEW

HOW TO USE THIS PLAYBOOK

1. DEFINE THE ASK

1. Start with *their* constraints and perspectives
2. Your concierge into city hall
3. Identify aspirations, goals and wins

2. REFINE THE ASK

1. Simple messages repeated often
2. Create an anchor
3. Test your messages

3. ARTICULATE A CREDIBLE PLAN TO SUCCEED

1. Identify the decision makers and their influencers
2. Find a champion (or two)
3. Master the process
4. Identify the opportunities to intervene
5. Find new alliances
6. A plan for who engages when on what
7. Make the job of decision makers easier
8. Start small and don't stop too soon
9. Get attention and find influence
10. Add new voices
11. Prevent difficult personalities from ruining it for others



4. HELP INDIVIDUALS ACT WITH IMPACT

- 1. Training and coaching**
- 2. Frame the issue through a story**
- 3. Effective meetings**
- 4. The secret to a memorable Committee presentation**

FURTHER READING

- 1. Popular literature**
- 2. Academic literature**

ENGAGE WITH CITYSHAPES



OVERVIEW

<p>OBJECTIVE</p> <p>This guide describes how citizen groups can most effectively advocate and hold to account their local governments, on issues such as:</p> <ul style="list-style-type: none">• Climate, transit, housing and other local priorities• Transparency, budgeting, engagement and other ways they do business	<p>AUDIENCE</p> <ul style="list-style-type: none">• Engaged citizens• Advocacy groups• Community associations• Change makers• Anyone standing up for their city
<p>ABOUT</p> <p>This guide was prepared by the CitySHAPES team, led by:</p> <ul style="list-style-type: none">• Catherine McKenney, former two-term Ottawa City Councillor• Neil Saravanamuttoo, former G20 infrastructure chief economist	<p>BACKERS</p> <p>This work was made possible through the support of the Centretown Community Health Centre and an anonymous donor</p>

Local Accountability

How do advocates most effectively champion their cause at the local government? Who is holding city hall to account?

Often it is not local media, which is in a sharp decline. **Often it is not a loyal opposition**, as most provinces do not allow municipal political parties. **Often it is not the electorate**, for which a turnout of 40% of eligible voters is considered high. The **checks and balances on local government are disappearing**.

Local government matters. Local government is the level responsible for many of the *mission critical* government services we use – such as garbage collection, snow removal and clean water. Across Canada, **local governments spend about \$200 billion annually**; roughly half of what the federal government spends.



Furthermore, city hall is where people are mostly likely to interact directly with government. **But when people engage their local government and get nowhere, they start to lose faith in government more generally.** People lose confidence in our politics and lose trust in our democratic institutions. People feel powerless in defending our democratic systems, and become complacent to those threatening to take our freedoms away.

In the absence of anyone else, **accountability of local governments falls to citizen groups.**

This **Playbook** is designed to **empower citizens and community groups to advocate more effectively for their priorities at city hall, and to better hold local governments to account.**

Better Advocates

This Playbook is primarily about **better advocating** at the city level. This playbook is **LESS focused on advocacy’s close cousins – mobilizing and organizing.** The differences between advocacy, mobilization and organization are summarized below.

	ADVOCATING	MOBILIZING	ORGANIZING
What	Influencing decision makers to make a specific change	Rallying as large numbers as possible in support of a cause	Organizing the community for political change
Objective	Achieve that change	Be seen	Achieve power
Numbers Involved	Small	Medium-to-High	High
Who	Experts & individuals with lived experience	Supporters of the cause	Community members looking for better
Duration	Campaign	Event	Extended
Principal Levers	Lobbying Expert analysis	Demonstrations Petitions	Timely action Voting



HOW TO USE THIS PLAYBOOK

This Playbook includes **21 steps, grouped into 4 themes**, for how community groups can be better advocates in holding governments to account on their promises, or advocating for governments to provide the services expected of them.

The four themes – Understand the Big Picture, Define the Ask, Articulate a Credible Plan to Succeed, Help People Act with Impact – are **largely sequential**. But life is messy, and so advocates can **jump around from one section to the next** and do more than one step at a time.

Each step is divided into two sections:

- **Summary of best practices** along with one or two examples
- **Worksheet** that advocates use to think through key questions and structure their strategy, messaging and tactics.

This advocacy system has been developed from a review of popular and academic literature, training guides for advocating at other levels of government, and practical experience. **The system is extensive and requires a concerted effort.**

There are **no shortcuts** to effective advocacy.



SECTION 1

DEFINE THE ASK



1.1 *THEIR* CONSTRAINTS AND PERSPECTIVES

WALK IN THE SHOES OF THOSE RESPONSIBLE FOR YOUR ISSUE.

- Start by understanding the perspective of insiders – those who deal with the issue on a day-to-day basis.
- This means the elected officials who make decisions, but perhaps more importantly, the staff who do the analysis and prepare the recommendations for what officials vote on.
- Many city staff with responsibility for a specific area of policy will want the same as you.
- But those staff operate in a bureaucratic system, and understand what the system is likely to accommodate at this point.
- When seeking the views of staff, talk to both City officials and the office staff of councillors.
- The first step in effective advocacy is to understand the world of the policy makers and how you might be able to support their objectives.
- Understand their world before telling them about yours.
- Staff may look to you as an ally in advancing their files, free to say what they cannot say.



WORKSHEET: *Their* Constraints and Perspectives

When discussing with City officials, start by asking them to describe their constraints — policy, procedural and budgetary – so that you are not immediately putting them on the defensive in justifying why they are not delivering a desired solution. Then ask about the process for review, as this is factual. Finally, ask their views on options for what “better” might look like. Recognize that individuals are concerned that something they say might be taken out of context and presented as a City position, so don’t ask “what do you think” but rather “what are options we could consider, recognizing that these may not reflect current City policy or thinking”.

In this worksheet, consider the questions you want answered. Add to the suggestions below.

POLICY AND PROCEDURAL CONSTRAINTS

*Does this fall under city jurisdiction, or is it shared with the federal or provincial government?
Is there an existing policy in place that guides our actions in this area?
Is there an automatic mechanism for reviewing this issue?
If not, how could it get considered?*



BUDGET CONSTRAINTS

*How much is currently spent on this priority?
What is the mechanism and timing for potentially increasing this spend?
Are there revenue opportunities outside of the city budget?*



PROCESS PERSPECTIVES

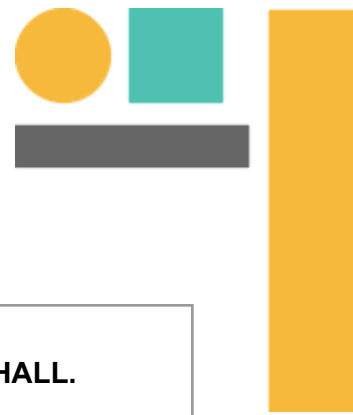
*Is there an automatic review (e.g., annually) of the policy?
How else could this item get in front of decision makers?*



CONTENT PERSPECTIVES

*What is the range of possible options, including within City policy and beyond existing policy, that could be considered to address the issue?
What are some of the best practices from other cities?*





1.2 YOUR CONCIERGE INTO CITY HALL

CITY COUNCILLORS AND THEIR STAFF CAN BE THE GATEWAY INTO CITY HALL.

- City councillors and the staff provide direct support to those constituents who ask for help.
- Unlike their federal and provincial counterparts, municipal representatives work closely with public servants and have a strong understanding of who exactly is responsible for what.
- Some councillors are great. Others provide little help. If you have the latter, work through another councillor interested in the file.
- Be sure to understand where your Councillor and others stand on your issue.
- Loop back with any insights. Your Councillor is not all knowing, and your discussions may provide insights that would be of interest to them.



WORKSHEET: Your Concierge into City Hall

SUPPORTIVE COUNCILLORS

Understand their positions on the issue.



OPPOSED COUNCILLORS

Recognize opposition and their rationale.



CONCIERGE

Ask your councillor to introduce you to the city experts on a file. Provide your councillor with a sample of the questions you would like to have answered.



FOLLOW UP

After your discussions with staff, what information would be valuable to the Councillor?





1.3 IDENTIFY ASPIRATIONS, GOALS AND WINS

MAP OUT A SET OF DESIRED OUTCOMES, FROM YOUR ORGANIZATION’S MISSION DOWN TO A MODEST WIN THAT KEEPS YOU IN THE GAME.

- Keep your eye on the prize – the aspirational goal of your organization.
- But identify a range of outcomes that allow you, at a minimum, to achieve future success.

Broad aspirations	the ultimate objective that your organization is working towards
Stretch goal	an ambitious outcome that internal experts view as a reasonable solution but unlikely to be achieved
Realistic goal	a solid outcome that internal experts view as possible
Win	a modest result that shows supporters you can deliver, and upon which you can build for future successes

- Identify what would be a realistic goal, and what would be a stretch goal, through speaking with internal experts who understand what the government might consider.
- Identify a win, no matter how small, that demonstrates to your supporters that you can achieve results and which you can build upon for future successes.
- Understand whether your goal produces “action”, “outcomes” or both by City Hall. Be careful with any goals that produce action but with no outcome. Make sure these are not viewed as closing the file (e.g., a motion at Council to write to the province to request more funding).



EXAMPLE

Goal Setting for Affordable Housing Advocacy

Aspirational	<i>End homelessness and housing need</i>
Stretch	<i>Create 1,000 new affordable housing units annually</i>
Realistic	<i>Double the affordable housing budget</i>
Win	<i>City agreeing to undertake analysis outlining new options</i>



WORKSHEET: Identify Aspirations, Goals and Wins

ASPIRATIONAL GOAL

Your organization's mission.



STRETCH GOAL

Ambitious outcome, that internal experts consider sensible but unlikely.



REALISTIC GOAL

Solid outcome, that City staff consider possible under the right conditions.



WIN

Modest success that shows supporters you can deliver.





SECTION 2

REFINE THE ASK



2.1 SIMPLE MESSAGES EVERYONE CAN UNDERSTAND

SIMPLE MESSAGES REPEATED OFTEN

- Create 1 to 3 max simple messages, that can each be summarized in a single sentence.
- Focus on the “why”, rather than the “what” or the “how”.
- *Because* is a magic word for persuasion, as it indicates there is a reason for the request.
- Appeal first to emotion, rather than reason.
- Asking for a “pilot” can make it an easier decision for everyone.
- Don’t try to cover the entire waterfront of issues.
- Don’t lose people in deep policy explanations.

EXAMPLE

From precise

- Follow through on our Climate Change Master Plan commitment to reduce our greenhouse gas emissions, by 50% for corporate emissions and 68% for community emissions by 2030, and to net-zero by 2040 for corporate emissions and by 2050 for community emissions.
- Provide annual reporting on greenhouse gas emissions reductions.



To effective

Do what we said we'd do to fight climate change, because we owe it to future generations.

- Reduce total pollution emissions in Ottawa in half by 2030 and fully by 2050.
- Report back to the public every year, to update on how the City is delivering on its promises.



WORKSHEET: Simple Messages Everyone Can Understand

Create a key message and a slogan for your work. Explain the why, what and how of what we are proposing.

In this worksheet, consider these questions when developing simple messages.

KEY MESSAGE



SLOGAN



WHY

*we are asking ...
and who we are asking for*



WHAT

we are asking for ...



HOW

we would make this change happen ...





2.2 CREATE AN ANCHOR

COME UP WITH A NUMBER THAT DEFINES THE NARRATIVE

- Identify current spending on the priority.
 - Request that your councillor ask staff to provide the number if it is not clear.
 - Quantify in terms that people can understand, e.g., spending per household.
 - Compare against other spending decisions.
- Determine an alternative target level of spending, tied to desired outcomes.
- Use that number to shape the debate, and create a compelling narrative.
- Make it a realistic and pragmatic number, recognizing other city priorities.
- Find a number that describes outcomes rather than one that counts inputs.
- Consider potential sources of funding.
- Don't expect others to transform your vague concepts into a specific proposal.
- Don't let others preemptively put a target number on your proposal.

EXAMPLE

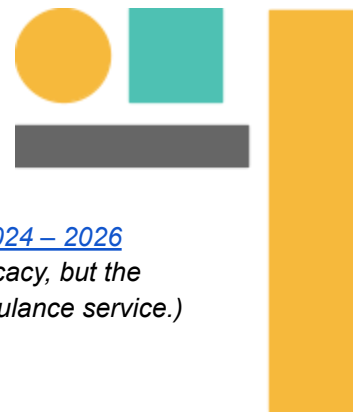
Advocating for More Paramedic Services in Ottawa

ANCHOR

- In 2022, Ottawa experienced, on average, **3 hours a day of "level zero"** ambulance service
- We can effectively **eliminate level zero occurrences if the City invests \$2m a year**, matched by \$2m from the province, to **hire 40 new paramedics**

OTHER SERVICE STANDARDS NOT USED IN THE ANCHOR

	Council's Target	2022 Actual
Response time for urgent care	75% within 8 min	62%
Response time for sudden cardiac arrests	65% within 6 min	48%



(This narrative and anchor was distilled from a technical 2023 [Ottawa Paramedic Service 2024 – 2026 Investment Plan](#) report to Council. This is a staff request to Council rather than citizen advocacy, but the required anchor and message would be the same if citizens were advocating for better ambulance service.)



WORKSHEET: Create an Anchor

In this worksheet, think through how a number can be used to anchor the debate.

EXISTING SPENDING

How much is currently being spent?

How much is this per person, or per household?

What are we getting for the existing spending?



ANCHOR NUMBER TO FRAME THE NARRATIVE

If [this spending], then [that outcome].





2.3 TEST YOUR MESSAGES

FIND A MESSAGE THAT PEOPLE WILL RESPOND TO

- Testing can be as cheap and simple as asking friends and family for their thoughts.
- A/B testing is likely the most affordable and scientific way to test a message.
 - e.g., spend \$50-100 to run two similar ads on Google or Facebook and see which is clicked more.

EXAMPLE

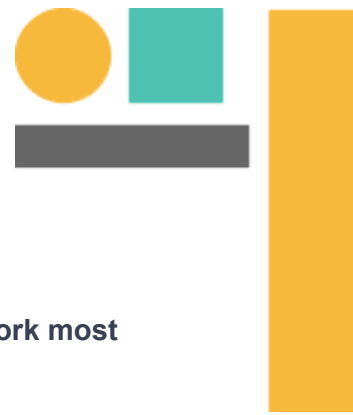
Ways to Test Your Message

Affordable



Expensive

- **Ask for feedback from friends and family**
- **Solicit feedback from outside the echo chamber**
- **Conduct in-depth interviews with target audience**
- **Review studies of effective messaging in your area**
- **Do online A/B testing**
- Run focus groups with a professional moderator
- Run dial tests, for immediate reaction to specific messages



WORKSHEET: Test Your Message

In this worksheet, decide how you can test your messages and which ones work most effectively.

TESTING APPROACHES

Which approaches will be used to test if messages are achieving their desired outcomes?

- *Feedback from friends and family*
- *Feedback from outside the echo chamber*
- *Interviews with target audience*
- *Review sector studies of effective messaging*
- *A/B testing on Google or Facebook*
- *Focus groups*
- *Dial tests*



EFFECTIVE MESSAGES

What messages work well?



LESS EFFECTIVE MESSAGES

What keywords or phrases are not working?





SECTION 3

ARTICULATE A CREDIBLE PLAN TO SUCCEED



3.1 Identify the Decision Makers and their Influencers

KNOW YOUR OPPOSITION AND WHO CAN INFLUENCE THEIR CHOICES.

- City Councillors will normally make the decisions of concern to you.
- But understand first if a new decision by the Council is required.
 - Explore if the issue has already been delegated to staff for implementation.
 - Explore if Council has already taken a policy decision that provides the authority to advance a proposal without a further decision.
- Assuming a Council decision is required, assess how Councillors might be expected to vote based on their track record and public announcements.
- Councillors will pay closer attention when a dozen or so concerned constituents, particularly new voices that do not usually engage in local affairs, contact them on an issue.
- Individual councillors may also be particularly sensitive to the concerns of certain interest groups, such as small business owners or property developers.



WORKSHEET: Identify the Decision Makers and their Influencers

In this worksheet, identify the expected support and opposition to your proposal among City Council, as well as influencers of those members generally opposed.

COUNCIL MEMBERS GENERALLY SUPPORTIVE

Which councillors are likely to support?



COUNCIL MEMBERS GENERALLY OPPOSED

Which councillors members are less likely to support?



INFLUENCERS OF THOSE GENERALLY OPPOSED

Are we able to identify potential supportive influencers for those councillors expected to oppose?





3.2 Find a Champion (or Two)

IT'S HARD TO CROSS THE FINISH LINE WITHOUT A CHAMPION.

- Change does not come easily in bureaucratic systems. Change will be difficult without a champion who has the ambition and understanding of the process to push.
- In city governments, mayors typically have considerable ability to achieve what they want. Mayors are great to have as a champion, but often when you are advocating, it is because your issue is not a priority for the mayor and their leadership team.
- Champions can be found at the Council table, or within staff.
- Staff are often effective advocates as they provide the analysis that defines how an issue is framed, and understand how it is advanced through the system.
- There may be potential champions outside of City Hall, although this is generally less effective than internal champions. Outsiders with a high profile or influence over decision makers may be prepared to stand up for your initiative, but probably not in the sustained manner you require for success.



WORKSHEET: Find a Champion (or Two)

In this worksheet, create a list of potential individuals who could serve as a champion for your proposal.

COUNCIL

Which Council members care about your issue, and would be willing to invest political capital in seeing it advanced?

Who can you get to agree to take a stand and be a “champion” of this initiative?



STAFF

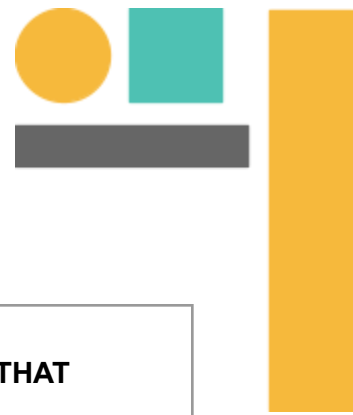
Who on staff is concerned with your cause, and willing to help advance a proposal?



EXTERNAL

*Are there high-profile individuals outside of City Hall who could act effectively as a champion?
Is their support a one-off announcement or would they help push throughout the process?*

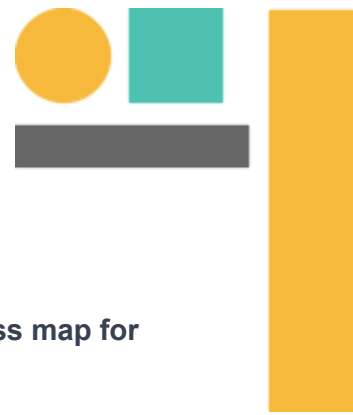




3.3 Master the Process

IT'S HARD TO INFLUENCE CHANGE WITHOUT MASTERING THE PROCESS THAT OFFICIALS GO THROUGH TO DECIDE UPON THAT CHANGE.

- Governments run on processes, but those processes are often not clear to outsiders.
- Learn about the official process, so that you can prepare pro-actively. Most people scramble to react only when they learn about important milestones as they come forward.
- If the official process is not clear and published in advance, advocate that it be made clear and public.
- If no process currently exists, flesh out what the process should look like.
- Start by understanding past decisions on an issue, and whether those decisions have built-in review mechanisms.
- Look for the following milestones in an official process:
 - Catalyst to consider an issue (e.g., Term of Council priorities / Existing plan / Council direction)
 - Staff-councillor background discussions
 - Official public consultation meeting(s)
 - Staff paper
 - Committee meeting
 - Council meeting



WORKSHEET: Master the Process

In this worksheet, consider the following questions when developing a process map for decision making.

PAST DECISIONS

Are there built-in review mechanisms?



TRANSPARENCY

*Does an official process exist?
If yes, is it clear and complete?*



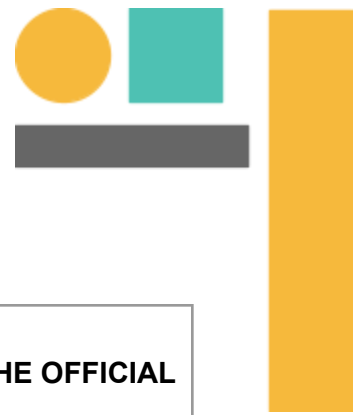
MILESTONES

When do you expect the following:

- 1. Catalyst to consider an issue*
- 2. Public consultation meeting(s)*
- 3. Staff report*
- 4. Committee meeting*
- 5. Council meeting*

Are there other important milestones?





3.4 Identify the Opportunities to Intervene

THERE WILL BE OPPORTUNITIES TO ENGAGE THAT ARE NOT LISTED IN THE OFFICIAL PROCESS.

- The analysis provided by staff frames how an issue is considered. Whenever possible, advocates should engage early to ensure that their proposals are included in the options that go forward to Council.
- Recognize that early engagement may not be possible on certain files. Analysis may be framed to present the issue in a way that is contradictory to your proposal. In this case, be prepared for an uphill battle.
- In terms of the six steps in a typical city process, advocates should be able to find multiple points of engagement, such as:
 - Catalyst to consider an issue (e.g., Term of Council priorities / Existing plan / Council direction)
 - *Meet with councillor*
 - Staff-councillor background discussions
 - *Meet with staff*
 - Official public consultation
 - *Participate in official public meetings*
 - Staff report
 - *Meet with councillor*
 - Committee meeting
 - *Public delegation*
 - Council meeting



WORKSHEET: Identify the Opportunities to Intervene

In this worksheet, identify when you could engage with officials.

EARLY ENGAGEMENT

Is there an opportunity to share your views with councillors?

Is there an opportunity to engage staff before they present analysis?



OFFICIAL PROCESSES

How will you engage in official consultations and committee meetings?





3.5 FIND NEW ALLIANCES

PARTNER WITH THE USUAL SUSPECTS, BUT ALSO *NOT-THE-USUAL* SUSPECTS.

- Identify who else is working on this issue:
 - Other non-governmental groups
 - Other levels of government.
- Understand how others are framing the issue and what they see as priorities for action, and consider if this framework works for you.
- Be aware of specific asks that others have put forward to the municipal authorities.
- Allying with traditional partners will only have limited impact on a Council that is used to hearing from “the usual suspects”.
- Bringing in new partners, with entirely different mandates, provides a novelty that will get the attention of Council and greater consideration.
- Reach out and try to partner up with groups that would share your objectives and values, although who may not seem as naturals to advocate for your cause, such as:
 - Physicians
 - Nurses
 - Disability advocates
 - University and college professors
 - Politicians from the “other side” of the spectrum
- Decision makers view coalitions of groups as much stronger than the sum of their parts.

EXAMPLE

Cycling advocates calling for bike infrastructure might be expected to partner with:

- Walking groups
- Environmental groups
- Public health groups

Cycling advocates might expect more reception from Council if they could partner with:

- Business Improvement Associations
- Hotel associations and tourism-reliant businesses
- School groups and individual kids wanting to cycle in their neighbourhood



WORKSHEET: Find New Alliances

Who are other interested parties on this topic? Where do they stand on the issues? Is there scope for collaboration?

In this worksheet, consider the questions you want answered. Add to the suggestions below.

OTHER INTERESTED PARTIES

*What other non-governmental groups are working on this issue?
Is this issue being considered by other levels of government?*



THEIR FRAMING AND PRIORITIES

*How are other groups framing the issue?
What do they see as priorities for action?*



OTHER POTENTIAL PARTNERS

Which non-traditional organizations might share your values and objectives?



OPPORTUNITIES FOR COLLABORATION

*Is there an opportunity for your group to partner with other groups?
How could each party benefit from a partnership?*





3.6 A Plan for Who Engages When on What

IDENTIFY THE CONTRIBUTIONS OF TEAM MEMBERS, WITHOUT BEING TOO RESTRICTIVE OR TERRITORIAL.

- Make all of the advocacy team aware of the different inputs required for success.
- Encourage team members to contribute where they can.
- Create a process that serves as a starting point of who is willing to help, rather than an exclusive list of who is permitted to engage in that area.
- Be aware of the tasks that no one is signing up for. These are holes that may need to be filled.
- Treat the volunteers' offers as dynamic and fluid. Priorities, availabilities and interests will change. Adapt accordingly.



WORKSHEET: A Plan for Who Engages When on What

In this worksheet, outline who is willing to contribute at different stages of advocacy. Everyone should be encouraged to help, and so any list should be seen as the initial contributors and not designed to prevent others from helping later.

BACKGROUND ANALYSIS

*Who can contribute analysis on policy, process and funding?
Who can prepare a first draft of a briefing note?*



MESSAGING AND DIGITAL ASSETS

Who can help with any digital assets (graphics, maps, websites, ...) required?



OUTREACH TO OTHER GROUPS

Who is engaging other interested parties?



ENGAGEMENT WITH DECISION MAKERS

Who is engaging decision makers?



COMMITTEE PRESENTATIONS

Who will present at Committee?



FOLLOW UP

Who is tasked with following up after decisions are made?





3.7 Make the Job of Decision Makers Easier

PROVIDE DECISION MAKERS WITH A BRIEFING NOTE THAT INCLUDES ANALYSIS AND POTENTIAL SOLUTIONS TO HELP THEM ADVANCE AN ISSUE.

- Council members and their staff may neither have the time or expertise to undertake the analysis and identify potential solutions to your issue.
- City staff will provide some analysis to decision makers, but that analysis may not include the considerations or options that you consider relevant.
- Briefing notes are also useful for clarifying your own thinking and for codifying the position of your group, or your coalition of groups.
- Provide decision makers with a concise briefing note that includes analysis on:
 - Background to the issue
 - Considerations
 - Potential solutions
- As a follow up, and if agreed by the Councillor, you could additionally provide draft language for a resolution to be considered by City Council.



WORKSHEET: Make the Job of Decision Makers Easier

In this worksheet, outline the key points for a briefing note to help a decision maker understand the issues and potential solutions.

BACKGROUND

What is the problem we are trying to solve?



PROPOSAL

What is our ask?

What are the expected results?



CONSIDERATIONS

What is the proposed cost?

How would this proposal impact others?



RECOMMENDATION (AND ANY OTHER OPTIONS)

Is there a Plan B that Council could consider?





3.8 Start Small and Don't Stop Too Soon

TURN SMALL WINS INTO BIGGER WINS, AND SETBACKS INTO FUTURE WINS.

- Small wins demonstrate to supporters that you are able to achieve results.
- Success motivates more people to join with you, and creates a sense that more ambitious objectives are possible.
- A new advocacy group may wish to work initially for modest goals, which it can use to build support for pursuing bigger wins.
- Setbacks are disappointing, but look for the silver linings, such as:
 - New supporters upset with the decision who are willing to join the cause
 - A decision that can be used to frame the narrative for a future engagement
- Don't give up too quickly. Early engagements are unlikely to produce the result you want; stay at it.



WORKSHEET: Start Small and Don't Stop Too Soon

In this worksheet, consider what a win could look like and how we can keep decision makers engaged.

POTENTIAL WINS

What is a reasonable win that we can use to build bigger successes in the future?



SETBACKS

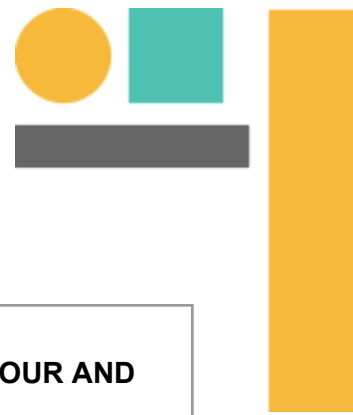
What would be the silver lining of any setbacks?



FOLLOW UP

When a decision maker provides an initial negative response, what follow ups can we use to keep the file moving forward? e.g., further information or analysis, engaging other decision makers

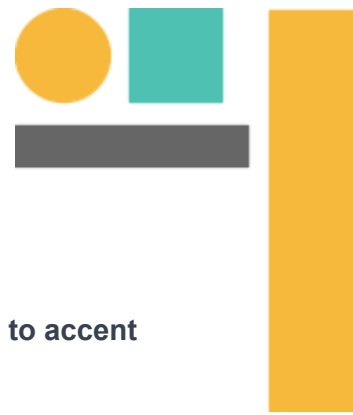




3.9 Get Attention and Find Influence

USE MEDIA ATTENTION TO HELP DEFINE HOW AN ISSUE IS FRAMED. HUMOUR AND THEATRICALS, USED STRATEGICALLY, CAN GET YOU A LOT OF ATTENTION.

- City Hall will often try to control the narrative, framing an issue in terms that works to their advantage.
- If you don't agree with that framing, one of your jobs is to use media attention to reframe the issue in terms that are more useful for you. By the media validating your framing, City officials are forced to respond in terms of your narrative.
- Press releases are the traditional way to reach media, however, other approaches may be more effective today, such as:
 - Email reporters directly with your story idea
 - Be visible on social media, tag local reporters and respond to their posts, and media may contact you directly
 - At Committee meetings and other public events, approach the media present and offer up, if interested, your willingness to provide a comment.
- And there is theatrics. We tend to think of advocacy as serious business. But it's the funny business that gets the most attention.
- Don't overdo the funny stuff. It should be a delightful accent that complements a solid base of analytics.



WORKSHEET: Get Attention and Find Influence

In this worksheet, think through opportunities for using humour and theatrics to accent your more serious work.

MEDIA ENGAGEMENT

Which reporters might be interested in your issue?

Do you have social media posts worth amplifying?



THEATRICALS

Are there opportunities for theatrics to get your cause attention?





3.10 Add New Voices

EXPAND BEYOND THE *USUAL SUSPECTS* TO HAVE YOUR MESSAGE HEARD.

- Municipal councillors pay attention to an issue when they hear about it from a set of new voices, i.e., not the usual advocates that contact them.
- It doesn't need to be a lot of new voices – even half a dozen people new voices concerned about an issue will signal to the councillor that something potentially important is happening.
- Advocates can have their message delivered more effectively through these new voices – particularly when those voices come from a recognizable community, such as small business or new Canadians.



WORKSHEET: Add New Voices

In this worksheet, identify relevant voices who might help deliver your message.

RELEVANT VOICES

What are some of the relevant voices on your issue, but who are rarely heard from?



MESSENGERS

Who are specific individuals who might be willing to articulate a message?

Who is best placed to ask these individuals?





3.11 Prevent Difficult Personalities From Ruining It for Others

STOP DISRUPTIVE PERSONALITIES

- Annoying, if well-intentioned, individuals can overwhelm a group, and drive people away.
- Groups, particularly as they get larger, should prepare in advance for how they would deal with difficult personalities.
- Group leaders and meeting chairs should be prepared – and given the authority – to cut off people who ramble on or go off topic, or who demotivate others.
- One option for dealing with disruptive personalities is to give them a task that does not involve a lot of interaction with others.
- Another option is to take them aside and be clear that they are having a negative impact on others, and ask them to not attend group events.



WORKSHEET: Prevent Difficult Personalities From Ruining It for Others

In this worksheet, prepare for how you would deal with difficult personalities.

ISSUE MANAGEMENT

Has the organization provided in advance its expectations for how people should or should not engage in the broader group?

Are meeting chairs clear in terms of their authorities to manage a discussion?

Are there disruptive personalities in your group that are having an impact on others?



ALTERNATIVES

What are alternative roles for those disruptive personalities?

Who would be best placed to deal with any disruptive personalities?





SECTION 4

HELP PEOPLE ACT WITH IMPACT



4.1 Training and Coaching

TRAINING AND COACHING VOLUNTEERS IS IMPORTANT FOR HELPING THEM TO ACT WITH IMPACT.

- Providing training and coaching to volunteers is important for them to be as effective as possible as advocates.
- A training session held by impartial outside advisors may be more effective than internal training in helping volunteers understand the importance of alignment.
- Ongoing coaching can be structured around the templates provided in this Playbook.
- Recognize that volunteers are volunteers, and will ultimately do what they want to do. If you want volunteer engagement, you'll need to give them some latitude.



WORKSHEET: Training and Coaching

In this worksheet, identify key components for training and coaching those who are part of the advocacy team.

OBJECTIVES AND STRATEGY

What is the objective of our advocacy?

What are the elements of our strategic approach?



MESSAGING

What is the story we are trying to convey?

What are the key messages for advocates to communicate?

What is messaging that you would like advocates to avoid using?



ANALYSIS

What is the initial assessment of the issue, and openings to advance it?

Do participants see missing or incorrect analysis?



PLAN

What is our plan for how to be successful?

How do individuals best fit in?





4.2 FRAME THE ISSUE THROUGH A STORY

FRAME HOW PEOPLE THINK ABOUT YOUR ISSUE THROUGH STORIES

- Create a story that tells everyone – supporters, allies, decision makers, media – why this issue is important and why now.
- Win the race to frame an issue – on terms favourable to us.
- If we don't frame it, others can do so in fiscal terms that are hard to overcome.
- Stories are effective to frame an issue, because they distill information into what matters.
- We are hard-wired to respond to stories, unlike facts which require work to understand.
- The “Hero’s Journey” is a formula for effective storytelling. Its simplified elements are noted below, along with a generic mapping of elements to a municipal context.

A hero	<i>Residents, or a group of residents</i>
Has a problem Internal External Societal	<i>Suffer from a poor city service, leading to Health and wellbeing impacts Inability to meet outside commitments Unsustainable city</i>
Caused by a villain	<i>Opponent, or lack of funding</i>
And meets a mentor	<i>City leaders, who can help solve the problem</i>
Who provides a plan	<i>A solution for improving services or adding funding</i>
And calls to action	<i>Help residents access those services</i>
That helps avoid failure	<i>Stop city from falling apart around us</i>
And ends in success	<i>Puts residents onto a stable trajectory</i>

Adapted from Donald Miller (2017) *Building a Story Brand*

- In the story, think of the end user as the hero and the city leaders as the mentor. (Advocates are the behind-the-scenes mentor to the mentor). The villain can be a person, organization or thing, such as lack of funding. Overcoming the hero’s internal problem is a powerful emotional tool that makes people care about your story.
- Prepare different versions of the story.
 - Standard two paragraph
 - First person perspective
 - One sentence summary
- Cut out the extraneous noise.



EXAMPLE

Funding Wrap Around Supports When Housing the Homeless

<p>1. A HERO</p> <p>▶ Chronically homeless individuals, such as [name], who are trying to establish a new life with city-provided affordable housing</p>	<p>3. AND MEETS A MENTOR</p> <p>▶ A group of City Councillors ready to do something about the homelessness emergency</p>	<p>6. THAT AVOIDS FAILURE</p> <p>▶ Funding for wrap-around supports prevents individuals from failing to transition into new housing, and in turn prevents crime and drug use from spilling over into neighbouring communities</p>
<p>2. HAS A PROBLEM</p> <p>External ▶ No wrap-around services provided, so individuals have to manage with little help</p> <p>Internal ▶ The demons are hard to battle alone</p> <p>Societal ▶ Issues are spilling out into neighbouring communities</p> <p>—</p> <p>Villain ▶ Lack of funding for wrap-around supports</p>	<p>4. WHO PROVIDES A PLAN</p> <p>▶ Councillors put forward a financing plan, that proposes to share costs for new wrap-around services: 1/3rd from provincial authorities, 1/3rd from foregone increases in the police budget, 1/3rd from a [0.2]% earmarked tax increase</p>	<p>7. AND ENDS IN SUCCESS</p> <p>▶ Wrap-around supports are expected to [triple] the rate of successful transition from chronic homelessness to stable housing, increasing the success rate of our large investments in city-provided affordable housing</p>
	<p>5. AND CALLS TO ACTION</p> <p>▶ Councillors use a homelessness task force to rally widespread support for this more complete approach</p>	

CORE STORY

▶ Formerly homeless individuals are trying to establish a new life through a city-provided affordable housing unit. But transitioning to a new home is challenging if we are not funding the required wrap-around health and community support services. Individuals are rarely successful in battling the demons of addiction alone. As a result, the transition fails far too often, with crime and drug use spilling over into neighbouring communities.

City Councillors can help those transitioning to new housing to be successful. Councillors on the City’s emergency housing task force can advance a plan that would provide the critical wrap-around supports whenever city-funded housing is provided to someone in chronic homelessness. That plan would create a tripartite funding scheme that uses a small amount of



money to ensure that the large sums we invest in affordable housing are not wasted.

This modest initiative would have an outsized impact. We would anticipate the number of successful transitions from homelessness to stable housing to [triple]. This would in turn sharply reduce the spillover of crime and drug use into neighbouring communities.

ONE SENTENCE SUMMARY

Character. Problem. Plan. Success.

► Help the homeless overcome the challenges of transitioning to affordable housing, by finding an innovative financing solution for the critical wrap-around services that allow individuals to overcome failure and make our large investments in city-provided affordable homes a success.



WORKSHEET 1: Frame the Issue Through a Story

<p>1. A HERO <i>end user, what do they seek?</i></p> <p>▶</p>	<p>3. AND MEETS A MENTOR <i>empathetic and authoritative, who can help the hero win</i></p> <p>▶</p>	<p>6. THAT AVOIDS FAILURE <i>emphasize potential losses</i></p> <p>▶</p>
<p>2. HAS A PROBLEM <i>with 3 levels of conflict</i></p> <p>Internal ▶</p> <p>External ▶</p> <p>Societal ▶</p> <p>—</p> <p>Villain ▶ <i>relatable and singular root source of conflict</i></p>	<p>4. WHO PROVIDES A PLAN <i>give a name to a plan for solving the problem, or removing the risk of failure</i></p> <p>▶</p>	<p>7. AND ENDS IN SUCCESS <i>define a specific, compelling and achievable future, that resolves the problems</i></p> <p>▶</p>
	<p>5. AND A CALL TO ACTION <i>identify the button to push</i></p> <p>▶</p>	

Adapted from Donald Miller (2017) *Building a Story Brand*



WORKSHEET 2: Frame the Issue Through a Story

CORE STORY



ONE SENTENCE SUMMARY

Character. Problem. Plan. Success.

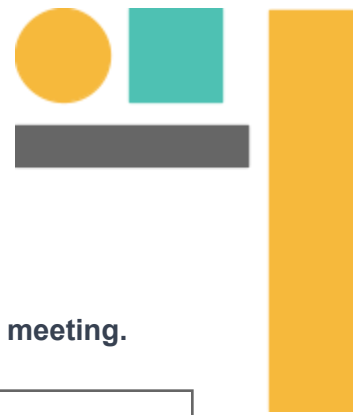




4.3 Effective Meetings

A SUCCESSFUL MEETING REQUIRES PREPARATION.

- Before going into a meeting with a decision maker, be clear on the following:
 - **Objective:** what are you hoping to achieve from the meeting
 - **Key messages:** what are the main messages you want to convey
 - **Value added:** how you can be of value to them
 - **Follow up:** next steps to advance the file, or follow up items that
- Beyond the meeting content, prepare the following for a successful meeting:
 - **Delivery:** practice what you want to say, and be sure it is a concise delivery
 - **Tone:** think about your desired tone, which normally you will want to be cooperative
 - **Logistics:** plan to be ready a few minutes early for the meeting – in person or online – so that you do not risk being late and flustered
 - **Dress code:** talk to others if you are not clear of the appropriate dress code



WORKSHEET: Effective Meetings

In this worksheet, think through what is required for you to have a successful meeting.

OBJECTIVES

What is our primary objective for the meeting? What is a backup objective?



KEY MESSAGES

What are the key messages we want to communicate?



VALUE ADDED

*What can we provide, now or in the future, that would be useful to them?
If not clear, should you ask during the meeting?*



FOLLOW UP

What would we anticipate to be the next steps? Or ways to continue the dialogue, if they are not generally supportive?



DELIVERY, TONE, LOGISTICS AND DRESS CODE

*Have you got a concise delivery planned, and has it been practiced?
Is your tone cooperative, or something else?
What do you need to take into consideration, to be on time for the meeting?
Is there any confusion about the appropriate dress code?*





4.4 The Secret to a Memorable Committee Presentation

FOCUS ON ONE OR TWO SIMPLE MESSAGES, LINKED WHEN POSSIBLE TO A PERSONAL STORY.

- Start with the basics: know how long you can speak; who is your audience; and, what you can and cannot do (e.g., cannot talk about a different topic, cannot ask direct questions to members).
- Prepare your talk. Write it out, practice it and time it. If your time limit is 5 minutes, prepare a speech that takes about 4 minutes to deliver (about 600 words).
- Aim to make one or two, and never more than three, points. Your audience can only hold three thoughts at a time.
- Committee members might ask you follow up questions. If prepared, that can be an opportunity to pivot the question to other points you want to make.
- Telling a personal story of how the situation affects you or others is the secret to a memorable presentation. But situate that story in the context of the broader reform.
- Try not to read your speech. Know your key points and practice, practice, practice. Aim to come across as if you are talking to a friend.
- Start by telling them what you will say. Say it. Conclude by telling them what you just said.
- In-person delivery in the Committee room is MUCH more impactful than virtual delivery.
 - Bring a friend, or sit with other speakers from the public, to be more relaxed.
 - Bring your own water. Drinks and cookies will not be provided.
- In-person delivery can lead to follow up media coverage. Approach the media in the committee room and say, if interested, that you would be available to provide a comment.
- When coordinating with others, it's ok, in fact good, if multiple people make the same points. Hammer home key points rather than trying to cover the waterfront of issues.
 - The response that you are trying to elicit is “we hear the community loud and clear”, rather than “there are a lot of different perspectives out there”.
- Consider using theatrics to get attention.



WORKSHEET: The Secret to a Memorable Committee Presentation

In this worksheet, consider the following for an effective presentation.

BASICS

How long are you able to speak? How many words is that?

Will you present in-person or virtually?



KEY POINTS

What are your 1-3 key points?

Is there a personal story that relates to the main point?

What are additional points you would make in any possible follow up questions?



OTHER CONSIDERATIONS

Have you practiced out loud, with a mirror?

Are there other points you might want to make if there are any follow up questions?

Is there an opportunity for theatrics?





FURTHER READING

1. Popular Literature

We've read everything we can find on the topic of citizen empowerment and social movements, and some of the more recent work on effective communications. If you are looking for more, here are some top books we would suggest.

Berger, J. (2023) **Magic Words**. HarperCollins

Bond, B., & Exley, Z. (2016) **Rules for Revolutionaries**. Chelsea Green Publishing

Ennis, G. (2023) **Dark PR**. Daraja Press

Fenton, D. (2022) **The Activist's Media Handbook**. Seven Stories Press

Gallagher, N., & Myers, L. (2016) **Tools for Grassroots Activists**. Patagonia

Hasan, M. (2023) **Win Every Argument**. Henry Holt

Meslin, D. (2017) **Teardown**. Penguin Canada

Miller, D. (2017) **Building Story Brand**. HarperCollins

Popovic, S. (2015) **Blueprint for a Revolution**. Random House

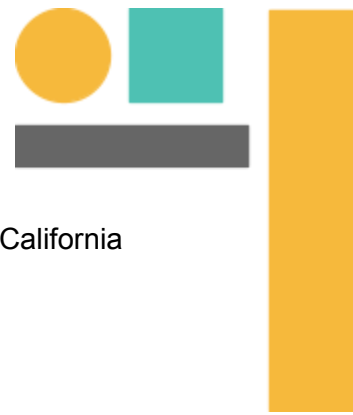
Taylor, A. (2020) **Remake the World**. Metropolitan Books

2. Academic Literature

If you are looking to go even deeper, jump into the academic literature. We suggest starting with the following researchers, for whom we have noted some of their publications.

Marshall Ganz

Rita E. Hauser Senior Lecturer in Leadership, Organizing and Civil Society at the Kennedy School of Government, Harvard University



- Why David Sometimes Wins: Leadership, Organization, and Strategy in the California Farm Worker Movement
- [Leading Change: Leadership, Organization, and Social Movements](#)
- Marshall Ganz' Framework: [PEOPLE, POWER AND CHANGE](#)

Jane McAlevey

Senior Policy Fellow at the University of California, Berkeley's Institute for Research on Labor and Employment

- No Shortcuts: Organizing for Power in the New Gilded Age
- A Collective Bargain: Unions, Organizing, and the Fight for Democracy
- Raising Expectations (and Raising Hell): My Decade Fighting for the Labor Movement

Zeynep Tufekci

Henry G. Bryant Professor of Sociology and Public Affairs at Princeton University

- Twitter and Tear Gas: The Power and Fragility of Networked Protest

Frances Fox Piven

Distinguished professor of political science and sociology at The Graduate Center, City University of New York

- Poor People's Movements: Why They Succeed, How They Fail
- Challenging Authority: How Ordinary People Change America

Francesca Polletta

Professor of Sociology, University of California, Irvine

- It Was Like a Fever: Storytelling in Protest and Politics
- Freedom Is an Endless Meeting: Democracy in American Social Movements

Saul Alinsky

Community Organizer

- Rules for Radicals
- Reveille for Radicals



ENGAGE WITH CITYSHAPES

CitySHAPES are the team that prepared this Playbook.

Catherine and Neil are available to coach groups through the Playbook’s system, and to help organizations increase the impact of their advocacy.

REACH US



[Fix Your City](#) newsletter at cityshapes.ca



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TEAM



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