

# Haldimand & Norfolk ADVOCACY Toolkit | 2015





# About this Toolkit

This toolkit has been developed to support action (advocacy) to change and develop healthy public policy in Haldimand and Norfolk. This toolkit can also be used by individuals working outside of Haldimand and Norfolk – the steps for advocacy are the same – but the examples and contact information provided here are specific to the Haldimand and Norfolk communities. It can also be used by people interested in changing a wide range of policies – or taking steps along the policy change process – but who might not be ready to tackle a broader healthy public policy initiative.

At its most basic level, policies are rules and guidelines that guide the behaviour and actions of an organization or group, or the individuals who belong to that organization or group. All organizations and groups have policies. Mu-

nicipalities have policies that govern their own facilities or staff. When a municipality passes a policy for the community it governs, it is usually called a by-law and is a legal form of policy. Provincial and federal governments pass policies in their jurisdiction that become laws. A good resource to [understand the definitions](#) of these various forms of policy is available at Public Health Ontario.

Healthy public policy is a type of policy that is geared towards improving the health of a community. Healthy public policy can be part of an organizational policy, a municipal by-law, or a provincial or federal law. In this toolkit, we focus on advocating for healthy public policy in organizations and at the municipal level. You can find more specific information related to [advocating for by-laws](#) at the municipal level in Appendix A.



Healthy Communities Partnership  
HALDIMAND and NORFOLK



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*Designed by Communications Services of the Haldimand-Norfolk Health Unit.*



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# 1. Introduction

**A**dvocacy is an important community process. Individuals, informal groups and organizations who want to share their opinion or ideas to influence, or inform, a decision making process are doing advocacy. Advocacy can help decision makers understand what is important to their members, the public or constituents, and make decisions that incorporate what their members and constituents believe is important. (*Community Toolbox, 2014*)

Advocacy can be a simple process - calling or contacting a decision maker to tell them what you think about an issue and how you want it changed. Or it can be a planned, formal process where one or more people develop a plan of action to influence or change a decision that is being made by an organization or government body. The process of understanding the issues, finding supporters, building support and making your case to decision makers can seem complicated.

Individuals and groups may be interested in advocating to decision makers on many different issues: the type of services being offered, changes in levels of services provided, the location of a planned waste treatment plant, whether or not a recreation centre should be built, or whether an organization should expand service hours. The goal of this toolkit is to help community members advocate to build [healthy communities](#). Advocating for healthy communities at organizational, municipal or provincial levels may be very similar to other advocacy processes, but may also differ in some important respects.



## **Advocacy:**

Interventions such as speaking, writing or acting in favour of a particular issue or cause, policy or group of people. In the public health field, advocacy is assumed to be in the public interest, whereas lobbying by a special interest group may or may not be in the public interest. Advocacy often aims to enhance the health of disadvantaged groups such as people with disabilities, people living in poverty or persons with HIV/AIDS. (*Public Health Agency of Canada, 2015*)



## **Read this toolkit if you are interested in:**

- Learning about advocacy for healthy communities
- Making policy changes in your community
- Understanding how to talk with and approach decision makers
- Ideas and examples to advocate for policy change

## 2. Purpose



This toolkit provides a step-by-step guide to support community members and organizations to take part in advocacy efforts for healthy public policy. Funded by the [Healthy Communities' Partnership Haldimand and Norfolk](#), this guide outlines advocacy processes, tactics, examples of advocacy actions and materials. A local group called [Norfolk Pathways for People](#) led the development of this toolkit. It is primarily intended for use with organizations and municipalities in Ontario. Regardless of the level of advocacy you are doing, this toolkit can support advocacy efforts.

### 2.1 How to Use this Toolkit

Advocacy can be challenging. Following the advocacy planning steps can maximize your chance of success. But advocacy is not a linear process. People enter and exit the policy process at different steps. (*Ontario Chronic Disease Prevention Alliance, 2011*) Community members can use this toolkit as a comprehensive guide for how to research, develop, implement and evaluate an advocacy plan, or they can learn about a specific step that they are currently working on.



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Your local health unit is an important community resource for anyone interested in learning more about the community's health and policy. In Haldimand and Norfolk, contact the [Haldimand-Norfolk Health Unit](#).



### 3. Advocacy for Healthy Public Policies



**A**dvocacy is how communities, organizations and individuals show that they support a cause or issue. In healthy communities, advocacy is about building the case for municipalities or organizations to adopt or make policies that benefit the health of a community. Decisions about healthy public policies are usually made by the people in charge of organizations related to a healthy public policy issue, including municipalities. This can include volunteers, staff or elected officials in the community. (Hegel, 2003) (Johnson, 2009)

#### 3.1 Healthy Communities

Building healthy communities is an exciting process. Healthy communities is based on two big ideas:

- Health is not just about living without illness, disease or disability – it is a state of physical, mental and social well-being.



#### Example of Advocacy to Support Healthy Communities and Healthy Public Policies

Norfolk Pathways for People is a community coalition that advocates for the development and improvement of connected pathways in Norfolk County. Norfolk Pathways for People grew from local interest in a public health initiative to work towards building walkable communities. Walkable communities are an important aspect of a healthy and vibrant community. To encourage citizens to rely on their cars less and choose walking (and cycling) more often, the environment in which they live, work, learn and play must support Active Transportation.



#### Pathways for People Objectives

- Advocating for new and improved trails and pathways in Norfolk County.
- Building a healthier, accessible and connected community.
- Promoting the safe use of local trails and pathways.
- Providing input to the Norfolk County Trails Advisory Committee.

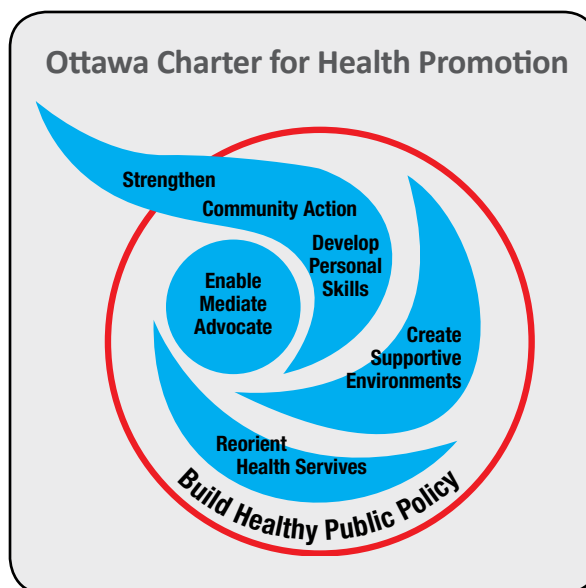
[Pathways for People](#) continues to be a voice advocating for public spaces that put people first. The group hopes to build more public support and demand for infrastructure changes (e.g. sidewalk improvements, paved shoulders for cycling) that will make communities more accessible and safer for users of all ages and abilities.

- People's health is not only about their personal health practices or their genetics, it is determined by where they live, and how they live. (*Ontario Chronic Disease Prevention Alliance, 2011*)

Addressing healthy communities means looking at the social, economic, environmental and physical factors that influence individual and community health. One of the key ways to do this is through healthy public policy. The 1986 World Health Organization's Ottawa Charter for Health Promotion shows that the main aim of healthy public policy is to create supportive environments that allow, and support, people to lead healthy lives. (*Ontario Chronic Disease Prevention Alliance, 2011*) Evidence shows that healthy public policies in a wide range of sectors have a profound impact on health status. Sectors for healthy public policy action include health and social services, education, government, sports and recreation, transportation, income, employment, and the environment. (*Public Health Agency of Canada, 2009*)

## 3.2 Potential Healthy Public Policy Areas

Building a healthy community means taking action



in a wide range of areas. As an example, Table 1 shows data about the community health status in Haldimand and Norfolk in the left column, and the related possible policy areas in the right column. This illustrates the broad areas where people interested in building healthy public policies in Haldimand and Norfolk could take action.

**Table 1. Community Health Status and Potential Policy Areas**

Community Health Status	Possible Policy Areas
11.4% of Haldimand and Norfolk residents lived in poverty in 2011	<ul style="list-style-type: none"> <li>• Transportation</li> <li>• Housing</li> <li>• Income supports</li> <li>• Employment supports and training</li> <li>• Child care</li> </ul>
64.8% of adults living in Haldimand and Norfolk residents reported consuming less than four servings of vegetables and fruit every day in 2011-2012	<ul style="list-style-type: none"> <li>• Municipal land use planning</li> <li>• Agricultural policies</li> <li>• Transportation</li> <li>• Income supports</li> <li>• Employment supports and training</li> <li>• Child care</li> </ul>
44.2% of adults living in Haldimand and Norfolk reported that they were not physically active during leisure time in 2011-2012	<ul style="list-style-type: none"> <li>• Municipal land use planning</li> <li>• Availability of safe hiking and biking paths</li> <li>• Municipal public services</li> </ul>

## 4. Advocacy is Important



**A**dvocacy efforts can impact both the communities affected by a change in policy and the individuals doing advocacy work. Successful advocacy can start, limit, implement or end government laws; modify the actual details of the policies; affect public and government opinion on issues; and ultimately change communities. (*Moore, 2006*) The most important aspect of advocacy efforts for healthy communities is that they contribute to systemic change for the whole population. Everyone who participates in, works with, or benefits from, that organization will benefit from a policy that promotes a community's health. (*Chapman, 2004*) (*Ontario Chronic Disease Prevention Alliance, 2011*)

Another benefit of advocacy is that it emphasizes collective action – or working together – and encourages individuals and communities to take part in planning and decision making for the health and well-being of their communities. Active, engaged and empowered citizens build vitality in a community, and ensure that decisions made reflect the people's interests. (*Hegel, 2003*) This encourages government to work for, and represent the needs of, the community.

### 4.1 How Do You Advocate?

The act of advocating, in its simplest form, is to express your support for a course of action to people in a decision making capacity. (*Moore, 2006*) It



Systemic change means that a whole system changes. Consider this:

If one business in one community puts a bicycle rack in front of its building and increases messaging within their building about cycling to work, this may increase the physical activity of people who go to, and work at, that one building. This is an organizational change that supports healthy communities.

If a municipal government requires bicycle racks in every public parking lot, and provides positive messaging about cycling to work throughout a community, this may change the physical activity of people in the whole community, and eventually it might change what people believe is the normal way of getting to work. This is a healthy public policy.

is a natural process. A child who asks her parents to change their policy about eating candy after dinner is advocating. A group of students might ask the principal to change a policy about what is appropriate to wear to school. They are advocating. A staff group might advocate for a change in the overtime policy. A community organization might advocate for a change in municipal policy around the use of a facility.

At heart, advocating for policies is about an ask. Advocating involves identifying the right ask, building support for your ask, making the pitch at the right time and to the right people, and supporting the implementation of that ask. This requires a planning process. (*Canadian Public Health Association, 2009*)

Many advocacy efforts are undertaken by groups of individuals acting together. Advocacy requires a lot of different types of skills – strategic thinking, using the media, public speaking, creative writing, researching to name a few. By working together, people who are interested in the same issue can benefit from the skills of others.

## 5. Planning Process for Advocacy

The planning process for advocacy outlined here is adapted from Public Health Ontario's [By-law Development As A Health Promotion Strategy](#) resource. (Bergeron, *By-Law Development As A Health Promotion Strategy*, 2014). This adapted process outlines seven steps to plan, implement, and evaluate advocacy processes. Many of these steps are typical planning processes and are adapted here for the specific purpose of advocacy.

These advocacy steps are outlined in the following pages, and links for more information are provided for each of the steps. The first three steps are important research and understanding steps. They lay out the questions that need to be answered before moving forward with the policy initiative. The middle three steps are the action steps for policy. They set out what needs to be done to implement healthy public policies. Once the policy is implemented, the last step defines how to make sure that the policy does what it was intended to do.



This process outlines a very planned and systematic approach to advocacy under ideal conditions. Sometimes, the act of advocating arises out of a new, and rapidly evolving issue and an individual, community group or organization must act quickly to respond to the issue.

When an issue arises, people usually jump into building support for their case (Step 4). This can be successful. However, a planned approach to advocacy can make sure you have the information you need, and a well thought out approach, before you go public with building support.

Another strategy may be to join forces with an organization or group who has already mapped out an advocacy plan, or, to work closely with a group of concerned citizens to learn about and plan an approach as quickly as possible.

### 5.1 Seven Steps for Advocacy



#### **What is the problem?**

Define and analyse the problem



#### **How can the problem be addressed?**

Develop and assess policy options and readiness for change



#### **Who has the power to address the problem?**

Identify decision makers and influencers



#### **Build support for the proposed policy issue**

Make stakeholders aware of the policy issue



#### **Write the formal policy**

Develop the actual policy



#### **Promote and enact the policy**

If unsuccessful, restructure and return to appropriate step



#### **Evaluate and monitor the policy**

Is the policy doing what it was intended to do?

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

A good understanding of the problem is the basis of a good advocacy process. This step is about understanding what is making the issue a problem, and identifying the goals and objectives for your policy efforts. It is the foundation of your efforts and a critical piece of the planning process.

There are two main parts of this step:

- **Part One: A situational assessment or needs assessment**

This is a research step. In this step, find out as

much about the community, the issue and related issues as possible – including understanding any opposition to the issue. A process called a [situational assessment or a needs assessment](#) is often used to do this research. It means looking at the problem in the context of the community at the present day. (*Public Health Ontario, 2015*) This will include answering important questions about the issue:

- What is the problem?
- Who is most affected by it?
- What is the cause of the problem?
- What factors in the community affect the problem?
- Who has done what to try and resolve the problem?
- What are the costs and impacts of addressing or not addressing the problem? (*Bergeron, Focus On: By-Law Development As A Health Promotion Strategy, 2014*)

#### • **Part Two: Goals and objectives statement**

Using the information you discovered, develop a summary statement identifying the problem, the goal (the policy result you are striving for) and objectives (two to three key outcomes you will achieve along the way that are critical to achieving that goal). This summary statement is the critical document that will keep your organization focussed on your goal. Good goals can inspire stakeholders to become invested in the issue and join your cause. (*Bergeron, Focus On: By-Law Development As A Health Promotion Strategy, 2014*) The organization [America Walks](#) provides a good summary of how to develop this issue statement. Detailed



Collecting data about the community's health and health issues in a community is important as part of a situational assessment. Public Health Ontario created a resource showing trends for [key public health indicators](#) by public health unit and Ontario overall. These snapshots may contain important information that you can use to support the health issue in which you are interested.



#### **Key Advocacy Skill: Strategic Analysis**

Strategic analysis is the process of reviewing information and data, and using that information to answer three strategic (and basic) questions:

- What is the problem?
- What is the desired solution?
- What is the target for change? (*Johnson, 2009*)

Steps 1-3 of the advocacy process involves collecting a lot of information. This information will help you and your group define your policy objectives and build support for your cause. Using this information effectively is the foundation of your advocacy effort. Use the questions outlined to assess the information that you have gathered, identify any gaps, and develop your policy approach.

As you move through the advocacy process, more issues will arise that will need strategic analysis. You can continue to use good questions, collect new information and review the answers to your questions to make sure that you understand the issues and that your proposed solutions are appropriate.

#### **Tips**

- Review the information you have gathered. If information is missing, find out who might be able to fill in those information gaps and get the information that you need.
- Once you answer the strategic questions, have a few people who are not familiar with the issue review the information and give feedback:
  - Do the answers to the questions flow logically from the information available?
  - Does it make sense?
  - Is it clear and understandable?
- As a result of this review, make necessary revisions to your strategic analysis of the situation. (*Johnson, 2009*) (*Ontario Chronic Disease Prevention Alliance, 2011*)



information about [how to develop good goals and objectives](#) is available.

## Step 2: How Can the Problem be Addressed?

It is important to understand possible solutions for the identified problem, and then understand if the community is ready for that solution. How ready the community is for change will determine whether or not you should continue with policy change efforts, or review your goals and objectives. (Bergeron, *By-Law Development As A Health Promotion Strategy*, 2014)

With the information you found in Step 1, create a list of potential policy options that can solve the identified problems. To create the policy options, research how other organizations or communities have solved the problem. One way you can do this is to conduct an internet search for the type of problem you would like to address, and add the words *policy* or *municipal by-laws*. Study the search results to identify a list of potential policies or by-laws. You can also look at organizations and communities similar to yours to see how they may have addressed the same situation. Once the options are developed, you will need to review them against the goals and objectives to find which option is the best fit for your organization or community.



### Key Local Stakeholders

Municipal councils are important stakeholders to address important community policies and by-laws.

#### Haldimand County Council

- Contact information for [Mayor and Councillors](#)
- Contact information for [Department Staff](#)

#### Norfolk County Council

- Contact information for [Mayor and Councillors](#)
- Contact information for [Department Staff](#)



(Bergeron, *Focus On: By-Law Development As A Health Promotion Strategy*, 2014) More information about the municipal by-law process is in [Appendix A](#).

The next step is to understand the level of community support for the potential policy solution. You will need to think about different community stakeholders whose opinions on the issue are important. This might include community members, organizations and municipal stakeholders. You can gather information from stakeholders, media coverage or opinion surveys. You can use analysis processes like [Strengths Weaknesses Opportunities and Threats](#) (SWOT) or a [Force Field analysis](#) (A Force Field Analysis worksheet is available at [Health Quality Ontario](#)) to explore and understand how ready the community is for change. (Bergeron, *Focus On: By-Law Development As A Health Promotion Strategy*, 2014) (Community Toolbox, 2014)

The consultation and analysis process may show that the community is not ready for change. In this case, it will be important to consider other strategies and approaches to address the issue.

## Step 3: Who Has the Power to Address the Problem?

This step will identify the main audience for your policy change efforts. Identifying the right stakeholders and influencers will increase your chances of success and minimize risks. Decision makers are people who are officially responsible for the proposed policy, like municipal councillors and organization leaders. (Bergeron, *Focus On: By-Law Development As A Health Promotion Strategy*, 2014) (Community Toolbox, 2014)



### Key Provincial and Federal Stakeholders

#### Member of Provincial Parliament

[Toby Barrett](#) is the Member of Provincial Parliament (MPP) for Haldimand-Norfolk. A [full list](#) of MPPs is also available.

#### Member of Parliament

[Diane Finley](#) is the federal Member of Parliament (MP) for Haldimand-Norfolk. A [full list](#) of federal MPs is also available.

Influencers are important too. They are individuals or groups who influence the decision maker's actions. Influencers may be municipal staff, the president of a prominent service organization, leaders in non-government organizations, or community volunteers with a strong voice. (*Community Toolbox, 2014*) (*Bergeron, At A Glance: The Eight Steps For Developing A Municipal By-Law, 2014*) It is important to find out as much as you can about both decision makers and influencers.

Review the information in Step 1 to identify potential decision makers and influencers. You may also want to brainstorm a list of potential decision makers and influencers to start the process. Consult with people who know the issues and the community to identify the most important or influential decision makers. (*Community Toolbox, 2014*)

Develop a plan for reaching out to the groups that are most likely to support, and be useful, in working towards your goal. Use the summary statement as a key document to outline how you can work with your potential partners. Working with partners can be very rewarding, and challenging. There are many resources [here](#) and [here](#) that can support your efforts.

At this point, it is important to also identify your issue's potential champions. A champion is someone who is a decision maker in the organization that you are hoping to influence. It can also be someone who has important access to decision makers and who can help to drive the policy through the decision making process. (*Ontario Chronic Disease Prevention Alliance, 2011*)

#### Step 4: Build Support for the Policy

This step is what most people will associate with advocacy - the actual act of getting your message out to the community, and to decision makers and influencers. In this step, you will use all the information that you have gathered about the policy issue, and who your audience is, to develop and share information about your issue with them. The ultimate objective of this step is to reach out to important community stakeholders and gain their understanding and support for your policy position. (*Bergeron, At A Glance: The Eight Steps For Developing A Municipal By-Law, 2014*)



#### Advocacy for Smoke-Free Outdoor Spaces in Haldimand and Norfolk



The Haldimand and Norfolk's HEAT youth advocacy team was interested in tackling tobacco control in their community, specifically building smoke-free outdoor spaces. They examined local data and investigated what other groups in Ontario were doing around smoke-free outdoor spaces. Based on this information, the group decided to focus on building policy for smoke-free outdoor spaces.

HEAT determined that they needed to create awareness around the issue of smoke-free outdoor spaces locally. Together, they:

- Developed key messages
- Held cigarette butt litter clean ups and beach events and shared their activities with the media
- Publicly profiled groups that made their spaces smoke-free
- Collected signatures to demonstrate support for smoke-free outdoor spaces
- Developed and implemented a survey of public opinion about smoke-free outdoor spaces
- Created communication materials based on activities and results

Building on these activities, HEAT developed a report for the Haldimand-Norfolk Board of Health to share the results of the survey. (*Personal Communication with Haldimand-Norfolk Health Unit Staff, 2015*) Samples of the advocacy and promotional materials that Haldimand and Norfolk HEAT produced are available.



### Ways to share information with stakeholders:

- Open forum or information meeting
- Attend stakeholder meetings and offer presentation
- Presentations at community events
- One-on-one meetings
- Websites, social media with discussion forums
- Share information with your membership, and the membership of your partner organizations (email, list serves)

There are [resources](#) to help you develop your own information and communication tools.



### Tips for convincing decision makers to proceed with your policy proposal:

- Link policies to a compelling issue or problem
- Build believable links between the health issue and the desired policy
- Propose clear and straightforward solutions to the identified problem
- Build coalitions with a broad base of community members to demonstrate support
- Promote lively discussion and debate
- Look for signs that a change is needed, and will be welcomed, by the community (*Public Health Ontario, 2012*)

Your group's knowledge of the community is critical. Think about the best ways to share this type of information with your target audience and what has worked in the past. Develop the key information that you want to share with the audience about your issue.

A briefing note is a good tool for this purpose. It is usually a two page document that outlines the key information about your issue, including a description of the problem and your proposed solution. (*Bergeron, At A Glance: The Eight Steps For Developing A Municipal By-Law, 2014*) Share the briefing note with key decision makers and influencers, or use it as the basis for talking points or presentations that you make. (*Ontario Healthy Communities Coalition, 2013*) A [sample briefing note](#) is provided for you to use as an example.

Building support among decision makers and influencers may seem intimidating, but it is important to communicate with them and share your views. With the proper preparation and support, it can be a very straightforward process. A civic participation group created a guide to help women from diverse communities take part in advocacy processes. We have adapted a part of their [resource](#) to help outline the steps and processes for communicating with influencers. Their full resource can be found [here](#).

As you and your group bring your message to the community, you may find that you learn more about how important community groups feel about your issue. It is important to reflect

on what you learned, and make any changes to your group's policy position as a result. Refining your policy position is important to gain as much support as possible for your policy issue, while remaining true to your position. (*Bergeron, At A Glance: The Eight Steps For Developing A Municipal By-Law, 2014*)

### Step 5: Write the Policy

In this step, you will actually write your group's draft of a new (or revised) policy that you want to see implemented. This draft policy defines exactly what you want decision makers to implement. It is important that the policy is specific and accurate. It can become part of the briefing note package that you will bring to the decision maker in the next step.

To be able to write a good policy, it is important to have inside information on how the organization typically writes policies. By-laws are usually written in a very formal and legal way that is dictated by the municipality, and each municipality has a slightly different by-law model. (*Bergeron, Focus On: By-Law Development As A Health Promotion Strategy, 2014*) See [Appendix A, Municipal By-law Development](#) for more information about writing a municipal by-law.

The main components of a policy include:

- Background / rationale for the policy, including the authority that allows the organization to implement the policy
- Specific details outlining what the policy is, who it affects, and any time or location restrictions





- Who is responsible for enforcing the policy
- Consequences if the policy is not followed
- A date for when the policy was developed, when it takes effect and when it will be reviewed (*Ontario Chronic Disease Prevention Alliance, 2011*)

A list of sample public health policies developed by the [Middlesex London Health Unit](#) is provided.

### Step 6: Promote and Pass the Policy

This step is perhaps the most active step, with many potential parts. The purpose of this step is to make the actual request to decision makers to pass the policy and implement it. Remember that you have already provided a lot of information to decision makers and stakeholders in Step 4, Build Support for the Policy. Step 6 is specifically about making the formal request for an organization to change or implement new policy.

However, sometimes encouraging decision makers to pass the policy will mean that you need to communicate broadly with those who will be affected by the policy, as well as directly to decision makers. (*Bergeron, Focus On: By-Law Development As A Health Promotion Strategy, 2014*). This is usually true when the issue that you are



### Key Advocacy Skill: Working Collaboratively with Multiple Stakeholders

Every issue will have supporters among the general public and organizations. It is important to identify people and groups who may share your position on the issue and develop a collaborative approach to your advocacy efforts. (Johnson, 2009) You may want to join efforts so that you have one united voice advocating together, or it may make more sense to work together but act separately. In this way, each group can take the lead on a different aspect of the issue, sharing the workload and creating a chorus of many voices advocating support for the same cause.

#### Tips:

- Make sure partners understand each other's perspectives and positions – especially where you have different views.
- Develop a joint statement that specifically defines your shared policy position including any compromises or secondary approaches that you are willing to take.
- Look for collaborative stakeholders broadly; think creatively about who might share your policy position.
- Be careful to collaborate only with individuals or organizations that are credible and that you trust. When you work together, you will share a reputation.
- Make the most of individual and organizational strengths that each group brings to the table. Organize tasks so that they are matched to the people and partners who have the greatest opportunity for success with them. (*Program Training and Consultation Centre, 2012*) (*Community Tool Box, 2014*) (*Hegel, 2003*)

advocating for affects the community at large. The community that will be affected by your policy is called the community of interest. If your policy effort affects a broad community, then you will need two different approaches:

- i. Promotion strategy for decision makers
- ii. Promotion strategy for community of interest



### Know Your Audience: Create Resources to Support Your Cause

Understanding that there is an upfront cost for building safe and accessible roadways and linking trails, the Haldimand-Norfolk Health Unit created two business cases for Active Transportation (AT).

- Norfolk- [AT & Tourism](#), [AT & Businesses](#)
- Haldimand- [AT & Tourism](#), [AT & Businesses](#)

These documents were created to build awareness and understanding of the financial benefits of Active Transportation.

#### i. Promotion Strategy for Decision Makers

Your decision makers need a specific communication approach geared to what is important to them, and how they hear messages:

- Communicate your policy proposal
- Demonstrate why it is important and plausible and appropriate to implement.

At an organizational level, there are usually formal processes involved before making a presentation to decision makers in an organization. Check what these processes are first, before you plan on

making the presentation. If you do not follow the organization's formal processes, you may not be allowed to speak, and your advocacy efforts will be delayed. At the municipal levels, the way that by-laws are introduced and promoted is a formal process. (*Community Toolbox, 2014*). A resource illustrating how to [influence decision-makers](#) can help with your efforts. See [Appendix A, Municipal By-law Process](#) for more information.

The presentation outlines your organization's position and support for the policy. There can be several presentations from different organizations or groups on the same policy, but they should each contribute different perspectives to the discussion. To be effective, it is important to use data and other evidence to support the desired policy, but also local, relevant and relatable stories. (*Chapman, 2004*) Facts and data (evidence) should be the foundation of your organization's issues and actions, but stories (anecdotes) contextualize or put a face on the issue. Be sure to select a presenter who knows the issue, is comfortable in a speaking role, and who can connect with members of the organization's board of directors or management. The main public faces of the advocacy process from your organization should be very knowledgeable on the issue. A resource outlining [how to prepare a presentation](#) has been adapted for both organization and municipal contexts and can help with your efforts. Sample deputations

**Table 2. Sample Communication Channels and Vehicles**

Communication Channel	Vehicle
Interpersonal	<ul style="list-style-type: none"> <li>• One-on-one meetings</li> <li>• Telephone</li> <li>• Email / letter</li> <li>• Postcards</li> </ul>
Media	<ul style="list-style-type: none"> <li>• Editorials</li> <li>• Letters to the editor</li> <li>• Press release / article</li> <li>• Social media: website, twitter, Tumblr</li> <li>• Advertising</li> </ul>
Community	<ul style="list-style-type: none"> <li>• Open house / forum</li> <li>• Workshop</li> <li>• Consultation</li> <li>• Deputation</li> <li>• Community events</li> </ul>

(Ontario Health Promotion Resource System) (Public Health Ontario, 2012)



made to municipal council by [Norfolk Pathways for People](#) are also available.

## ii. Promotion Strategy for the Community of Interest

If the issue that you are advocating for has the potential to impact on a community, it may be important to show the organization you are advocating to that your issue is supported by the community at large. To do this, your group will need to identify who your target audience is within the community, identify key messages and develop a communication campaign to reach that audience with your key messages. You may need to do more research about who you want to reach in the community, and how you can reach them with your messages. There are many resources [here](#) and [here](#) that can help you plan these efforts.

If you are working on a policy that will affect a lot of people, you may want to generate news coverage of your issue (media advocacy) and communicate broadly with a large audience. A sample of different types of communication channels and vehicles are listed in [Table 2](#). This provides an idea of the types of tools you may use to communicate with your target audience. See [Section 6](#), Potential Tactics for more ideas and supports.

## Pass the Policy

After following all the steps for advocacy, the ultimate decision about passing the policy is not up to your group. It is up to the organization to which you have been advocating. Whether your efforts are successful or not, it is important to acknowledge that the organization has done their job in listening to you, participating in any processes



## Key Advocacy Skill: Strategic Use of Media

The strategic use of media – or newsmaking – has an important role in promoting awareness of policy issues. Individuals and organizations can generate news opportunities that appeal to news organizations. Special events, the release of new health data or position papers related to the issue, special awareness days or weeks, or coverage of news events, can all be important news making opportunities. (Johnson, 2009) [Resources](#) and [tools](#) specific to media advocacy are available. A civic participation group created a guide to help women from diverse communities take part in advocacy processes. They identified a series of activities they could do to generate news coverage. We have [adapted a part of their resource](#). Their full resource can be found [here](#).

### Tips:

- Make a list of existing and potential activities related to your policy issue that can be promoted to the media. Think about which will be most useful to your issue and advocacy campaign.
- Meet with media outlets as part of the research process for your issue.
- Potential news opportunities can include national and provincial awareness weeks, release of national, provincial or local data, or events.
- Respond to media stories about your issue with opinion editorials or letters to the editor.
- Keep track of how your issue is being covered in the media. (Program Training and Consultation Centre, n.d.) (Community Tool Box, 2014)

you set up, and discussing the issue. If your issue passes, celebrate your success! Be sure to make yourselves available to the decision makers to support the implementation of the policy and offer public support for the decision that has been made, especially if it was contentious. (Bergeron, *At A Glance: The Eight Steps For Developing A Municipal By-Law*, 2014)



## Policy Persistence Pays Off

Haldimand and Norfolk's Please Be Seated Car Seat Safety Committee is a local advocacy group with provincial impact. The group worked with local and provincial partners over five years to change child car seat safety legislation to protect children from being injured during motor vehicle collisions. The provincial government announced new legislation around belt-positioning booster seats, implemented September 1, 2005.

This advocacy group demonstrated that local advocacy matters, even at the provincial level. The group identified three key lessons that they learned:

- Make your case to all political parties, not just the one in power.
- Clearly identify all the arguments for and against booster seat legislation (force field analysis).
- Choose only one spokesperson to build relationships with politicians.

In addition to the lessons they learned Haldimand and Norfolk's Please Be Seated Car Seat Safety Committee attributed their success to three factors:

- Passion for the cause – to remain committed over the long duration of the advocacy effort. Passion fuelled their commitment and helped them stay focused over the long advocacy process.
- Persistence – to continue to advocate for many years and remain committed to the cause. They took every opportunity to meet with politicians they were lobbying, remained focussed on their key messages, and appeared at Committee meetings whenever the issue was raised. This persistence built credibility with policy leaders who learned to trust and respect Committee members and their policy stand.
- Non-partisan – the Committee took every opportunity to advocate for child car seat laws with all political parties, regardless of which political party was in power. Their non-partisan approach ensured that the legislation would receive all-party support, and that when elections occurred, the new political party elected to provincial office was already aware of the issue and supportive. (Marks, 2015)



## Potential Policy Outcomes

A group of decision makers may decide to:

- Reject your policy issue
- Postpone making a decision until they have more information
- Direct staff to create a report and bring the issue back to the next meeting
- Refer the issue to a committee
- Accept and pass the policy

If the policy is not passed, or the matter is postponed or put towards a committee for consideration, you will be disappointed. However, this is not the end. You and your organization will need to continue to work with the same decision makers and stakeholders on healthy public policies. Be respectful of the efforts that the decision makers have made. You will need to review the advocacy process, make changes, and bring the issue back to the table again. (Bergeron, *At A Glance: The Eight Steps For Developing A Municipal By-Law*, 2014) This means that you will need to work with many of the same people again.

## Step 7: Evaluate and Monitor the Policy

Evaluation and monitoring the policy will help you to understand two things:

- Were you successful, and why? (Outcome and Process Evaluation)
- What the new policy has changed in the community. (Impact Evaluation)

### Were you successful and why? (Outcome and Process Evaluation)

Evaluating your advocacy campaign can be as simple as comparing the goals and objectives established at the beginning of the advocacy campaign, against the end result. This is an outcome evaluation. But whether you achieved, or did not achieve, the stated objective is not the only purpose of your evaluation. Understanding how you did what you did (process evaluation) will help you to understand what you did well, and what can be improved upon for your next efforts. (O'Flynn, 2009)

Asking good questions about the process can help build success for your future efforts.





Consider asking the following questions:

- What was the most successful aspect of the strategy? Why?
- What was the least successful aspect, and why?
- What strategies/activities/approaches would be good to use again? Which ones didn't work?
- Were there any major challenges that were not foreseen in the initial planning and risk assessment activities?
- Did any unexpected windows of opportunity open up that made success more likely?
- In addition to your stated goals and objectives, what were other positive outcomes of your work (e.g. the formation of a new coalition, the development of new media relationships, improved internal capacity, etc.)?
- Evaluation and monitoring is also important to understand the strengths and weaknesses of your advocacy campaign, and to help inform your next efforts. (*Canadian Public Health Association, 2009*) (*O'Flynn, 2009*)

Process and impact evaluations are usually focussed on the internal activities of the advocacy group. However, it is important to understand how activities and efforts were perceived and impacted your target audience. Tracking the implementation of your activities on an ongoing basis, adding an ongoing evaluation and monitoring component to meetings and meeting with key stakeholders after activities to ask for their input can help you get the information you need. There are many resources available to support [evaluation and monitoring](#).

### What the new policy has changed in the community. (Impact Evaluation)

Another aspect of evaluation is to ensure that the policy change you have fought for is actually working, and if it is not, to identify problems early and rectify them. This is called an impact evaluation. Organizations may review their policies on a regular basis (annually) and municipalities can address by-laws whenever issues arise, so it is important to maintain a good understanding of how the policy is working. (*Bergeron, Focus On: By-Law Development As A Health Promotion Strategy, 2014*)

To evaluate and monitor the policy, you will need to understand:

- Changes that have resulted from the policy
- Complaints or concerns with the changes
- Public opinion about the policy

How this is done will depend on what the issue is. For example, if your policy has created improved access to walking trails, then you will want to know how use of the walking trail has changed since the policy change has been made, changes in reported physical activity rates by the target audience, and if there have been any complaints about the new access point. If your policy has resulted in new municipal alcohol policies at municipally owned recreation centres, you may want to monitor any changes in the number of special event liquor licences issued for the centres, problems with underage drinking or substance misuse at the venues, and satisfaction of individuals using the venues.

Ongoing monitoring during an advocacy effort can help you to understand what is not working, revise your approach and try again. (*O'Flynn, 2009*) This is especially true of your efforts that did not work. (*Canadian Public Health Association, 2009*) Norfolk's Pathways for People maintains a [resume](#) of their activities, including those activities that did not work as they were intended, in order to help understand their ongoing advocacy efforts.

## 6. Potential Tactics



Many different tactics – actions or strategies – make up an advocacy process. In this section, several critical tactics are identified with practical tips and suggestions for how to achieve each. This information is not comprehensive. Other resources are available that provide full explorations of some of these issues. Links to these resources are provided where applicable.

### 6.1 Engaging Supporters

Identifying, communicating with and building relationships with people who support your cause is an important strategy, and can be very time consuming. Below are several approaches that you can use for specific aspects of this work. For more information, consider visiting the University of Kansas' Community [Tool Box](#).

#### Identifying Stakeholders

- Walk through your issue from all perspectives to identify other groups or individuals who may have a stake in the issue, or who are impacted by it.
- Host an event or activity that will allow you to collect names and contact information of people who are interested in the same issue as your group or organization. Be clear that you will be using the information to contact them about the issue (they will need to opt in



to receiving information). Use this information as your contact list and communicate with them regularly about the issue.

- Identify people who are stakeholders, but who do not support your cause, and why they do not support it.
- Be a group that others WANT to engage with.
- Make it easy for your supporters to show their support for your issue. Have ready-made letters, postcards, buttons or bumper stickers so that supporters can declare their support. (*Community Tool Box, 2014*) (*Community Toolbox, 2014*)

#### Relationship Building

- Meet on neutral, easily accessible territory, or rotate meeting locations.
- Share leadership of the issue with groups with whom you are collaborating.
- Make sure everyone has a role and feels a part of the movement.
- Build a shared history and trust by working together on increasingly more challenging activities.
- Be clear about the terms of your relationship – have a [terms of reference](#) or other document that outlines the purpose, membership and responsibilities and accountabilities of the group.
- Do what you say, and say what you do! (*Community Tool Box, 2014*) (*Canadian Public Health Association, 2009*) (*Community Toolbox, 2014*).

#### Supporting Influencers

- Give influencers – people who can influence stakeholders – early warning about issues that are coming up so that they can support you.
- Make it easy for influencers to help you. Make sure they have the information they need, and in a format that works for them.

- Keep in touch with influencers. Ask them what they need.
- Thank them for their efforts. (*Community Tool Box, 2014*) (*Community Toolbox, 2014*)

## 6.2 Awareness Raising / Communication Campaigns

In Steps 4 and 7 of the advocacy process, you will need to promote the policy issue that you want implemented and make the community aware of your cause. There are many ways to do this. In this section, six different tactics are identified. More resources are available on how to [develop](#) and [conduct](#) communication campaigns.

### Letters to the Editor

- Be brief and to the point. Focus on one central, well thought out idea.
- Make sure letters are well written- avoid grammar and spelling errors.
- Repeat your key message(s).
- Be locally relevant and respectful to decision makers.
- More information is available [here](#) and [here](#).

### Opinion Editorials (Op Eds)

- An opinion editorial is a cross between a letter to the editor and a newspaper article.
- Typically longer than a letter to the editor, it states an opinion from the perspective of an informed stakeholder.
- The author should be well-known, or a very credible source.
- Use both facts and storytelling to build your case.
- More information is available [here](#) and [here](#).

### Organizing a Public Meeting / Consultation

- Select a timing / venue that is convenient for the people that you want to attract to the event (target audience).
- Make sure that nothing else is going on in the community that will take participants away from your event – especially among your target audience.
- Make sure the event is well planned and have opportunities to engage with people attending.
- If the event is contentious, have a strong facilitator handle the meeting and outline rules and procedures at the beginning.
- Have refreshments available.
- Make both visual and written information available to view and take away.

- Include a take away action message that is easy for supporters to do. (Represent.us, 2014)
- There are many resources to support how to plan and execute a community [meeting](#) or [consultation](#).



### Working with the Media

- Create a contact list for the media and share that with the identified spokespeople.
- Be available and stick to the key messages.
- Learn how and when the media want to be contacted and try to give them as much notice as possible when covering a story or issue.
- Underuse and overuse of the media are both problematic. Underuse media and you miss opportunities; overuse and you drown out your own message.
- It can be easier to gain the attention of the media in smaller media markets- where media outlets are actively looking for local news – than large media outlets.
- Media outlets are in the business of telling stories, and stories are more interesting when opposing sides of issues are presented. Be careful to speak accurately and without exaggeration with the media.
- Create opportunities for interesting and relevant photo opportunities. (*Program Training and Consultation Centre*)
- There are many great ideas and ways to work with the media. Find out more at the [Program Training and Consultation Centre's Media Advocacy Network](#). Workshops and consultations are also available.

### Preparing a Press / Media Release

- Follow a formal press release style for your [press releases](#). This includes a date, embargoed release date (when the media can print the information in the release, if the release is prepared and distributed ahead of a major announcement), provide a headline for the issue, include “ – 30 – ” at the end of the release to indicate that is the end of content, and include follow up contact information.
- Provide quotes in the text of the media release.
- Provide Frequently Asked Questions (FAQs) or a backgrounder sheet if the issue is new or complex.

- Include visuals, or the opportunity to have a photo opportunity, if appropriate.
- Be well-written, and free of grammar or spelling errors.
- Focus on local impacts and local information wherever possible. (*Program Training and Consultation Centre*)

### Using Social Media

- When used effectively, social media can be very powerful, especially with target audiences who use it.
- Use social media (twitter, Facebook, Tumblr) to provide information to the general public, encourage people to attend events, provide real-time information about a breaking issue, and to provide a way for supporters to easily and quickly express support for your cause.
- Communicate regularly, but with a purpose. Share interesting and relevant information. (*Schein, Wilson, & Keelan*)
- Limit official posts / tweets to a few spokespeople who know how to use the media.
- Use humour, but be careful about being inappropriate or rude.
- Never post or tweet in anger!
- Have a process for vetting / reviewing posts and tweets to ensure that you are communicating appropriately and to minimize misinterpretation. (*Community Tool Box, 2014*) (*Ontario Chronic Disease Prevention Alliance, 2014*)



An excellent example of a group's efforts to influence decision makers is the [Ontario Chronic Disease Prevention Association's \(OCDPA\) Make Ontario the Healthiest Province Advocacy Toolkit](#). Developed in 2014, the Toolkit was intended to help the OCDPA and its members, to support efforts to build awareness for public health issues during the 2014 provincial election. The Toolkit is a comprehensive members' toolkit and offers numerous examples of key messages, samples of communication and media tools, how to use social media, call to action and critical background materials including questions and answers.

- See more information about how to use social media [here](#) and [here](#).

## 6.3 Influencing Decision Makers

The ultimate objective of your whole policy process is to influence decision makers. The tactics that you can use depend on who your decision makers are, what they believe, and your relationship with them. Use the research that you did in Steps 1-3 of the advocacy process, and the information that you get from influencers, to determine HOW you communicate with decision makers, and what you say.

A key issue to remember is to try to work with decision makers, not against them. Every issue will have pros and cons. Decision makers may have very worthwhile reasons for opposing the policy change that you are working on. Working to address the barriers that decision makers see in passing the policy that you are advocating for can be very effective to passing policy. This will create a win-win solution – and help build your credibility with decision makers. (*Personal Communication with Haldimand-Norfolk Health Unit Staff, 2015*) (*Personal Communication with Pathways for People, 2015*) (*Chapman, 2004*)

### Communicate with Decision Makers

- Contact decision makers when you have something worthwhile to say.
- Contact decision makers when they are working, or on official business. Respect their privacy and personal time, even if they are elected representatives.
- Recognize that decision makers have numerous files to work on – your issue is important, but it's only one file among many.
- Be passionate in your communications, but avoid blame and anger. No matter what their position is on the issue that you care about, they are individuals with their own ideas and perspectives. (*Community Toolbox, 2014*) (*Canadian Public Health Association, 2009*) (*Ontario Chronic Disease Prevention Alliance, 2011*)
- Review the [communication tips from the Maytree Foundation](#) for more help.





### Prepare a Briefing Note / Backgrounder

- The [briefing note or backgrounder](#) (also called a brief) is a two to four page document that is the best piece of communication you will prepare.
- Briefing notes or backgrounders are important communication tools that outline the issue, the reasoning behind the issue and key impacts and information that it is relevant for decision makers to know.
- The briefing note / backgrounder should include the following sections:
  - Information defining the issue
  - The ask or policy change that your group wants
  - Key points or issues, including impacts
  - Background information
- Key points or issues should include information that counters the main arguments against your cause. (*Ontario Healthy Communities Coalition, 2013*)

### Preparing Supportive Materials

- [Supportive materials](#) can include FAQs, backgrounders, and issue papers.
- Be brief and to the point.
- Include a combination of evidence in data form (quantitative information) and relevant stories or anecdotes (qualitative information).
- Include how similar communities have handled the issue.

- Examples of successful implementation of the policy issue.
- Address opposition perspectives and rationale supporting your cause. (*Forsythe, 2010*) (*Public Health Ontario, 2012*)

### Make a Presentation

- The presentation is outlined in Step 6. It should build on the brief, but include new information or perspectives building on the information provided in the briefing note.
- Practice your presentation and share what you are doing with your internal champion to gain their perspective.
- If several different speakers are presenting on the issues, make sure that each speaker presents different perspectives and uses a different approach. (*Maytree Foundation, 2014*) (*Status of Women Committee*)
- See these resources on making a presentation and [making a deputation](#) which documents the steps for making a presentation to decision makers.

## 7. Success Factors for Advocacy



**A**dvocating for healthy public policies can be a long process. It can be contentious, and it is something that occurs largely in the public eye. Before beginning a planning process, there are several success factors that are important to consider. These are outlined briefly here.

### Start Smart

Before you begin, understand all you can about the issue and how your community feels about the issue, including other stakeholders and decision makers. The more you can know, the better your advocacy efforts will be.

#### What does this mean?

- Do not shortchange the initial research and information-gathering process.
- Use a wide range of information sources.

### Be Positive and Constructive

While advocating might sometimes mean being an opponent, a positive and constructive approach can help your supporters stay by your side, and keep public sentiment on your side. Being a constructive part of the process will also help you with decision makers who may oppose your objective, but appreciate your approach. If an opponent criticizes your organization, begin by assuming the person doesn't have the same understanding that you do and is speaking out of a lack of information. (*Community Toolbox, 2014*)

#### What does this mean?

- Thank people for their work. Often and publicly.
- Publicly recognize that even if you disagree with your opponents, you want the best for the community.

- Look for the good in others' organizations or positions.
- If your organization or position on the issue is criticized, begin by assuming the critic does not know your organization or stand. Educate them.
- Keep the discussion focussed on the positive. (*Community Toolbox, 2014*)

## Shine a Light on Your Organization

Promote your organization's values and accomplishments - it is hard to oppose groups that you respect. If your organization is part of a larger provincial or national organization, emphasize your *local-ness* in the community, and what you have done there. (*Community Toolbox, 2014*)

### What does this mean?

- Make sure your organizations' values are emphasized.
- Always highlight what your organization believes in, and what it has done to support those beliefs, related to the issue being discussed, in relevant public communications.
- Time organizational celebrations or events to support advocacy efforts. (*Community Toolbox, 2014*)

## Plan (and celebrate) Small Wins

It can take a very long time to realize the outcomes of advocacy efforts. This can be disheartening for those working on the issue. (*Community Toolbox, 2014*)

### What does this mean?

- Purposefully identify achievements to highlight and celebrate.
- Communicate victories with supporters and highlight them in communications. (*Community Toolbox, 2014*)

## Message is Everything

The content of your message and how it is presented is critical. The key message should be framed in a positive way, be clear, consistent and direct. For example, if addressing poor air quality, the message should be about the amount of good health that will be gained from your proposed policy. Likewise, how the information is presented should be smooth and effective. (*Public Health Ontario, 2012*) (*Johnson, 2009*) Developing your message is

an important part of the process. Public Health Ontario has a [resource](#) that can help with the process.

### What does this mean?

- Carefully frame your issue.
- When responding to negative characterizations of your issue, restate your positive message rather than repeating their negative assertions
- Practice, practice, practice reciting your message and your presentation style (*Community Toolbox, 2014*) (*Public Health Ontario, 2012*)

## Passion Fuels Persistence

Passion for your cause is a requirement. Policy is often a very long process – people tend to be resistant to change. Generally speaking, decision makers do not lead contentious change issues – they follow others. Passion will keep your movement going when your issue becomes bogged down. (*Community Toolbox, 2014*)

### What does this mean?

- Pace your efforts.
- Plan for the long haul.
- Encourage passion in the cause. (*Community Toolbox, 2014*) (*Marks, 2015*)

## Understand What You Will – and Will Not – Compromise

Developing a policy can be a negotiation process. There is a gold standard policy outcome, but there may be other steps, that while not the best possible outcome, are improvements that can help address the policy. Having a very clear understanding within your group or organization of what is, and what is not, an acceptable compromise can help you achieve your goals. (*Community Toolbox, 2014*)

### What does this mean?

- Work with your group to develop a clear consensus on what is, and what is not, an acceptable outcome in your policy efforts.
- Keep your position on compromise close to your chest.
- Be sure your group is in agreement before suggesting a compromise position. (*Community Toolbox, 2014*)

## Be Opportunistic and Creative

If you have done your research well, it will be easier to capitalize on issues that arise in your





community and that you can tie to your cause. For example, a national organization may release new data about increasing rates of obesity and lack of physical activity. If you are ready, you can jump on this announcement and prepare a news release tying the new data to why your group is advocating for changes in municipal policy around bike lanes and sidewalks. You can generate a lot of attention for your cause by capitalizing on issues and events occurring in the broader community. (*Community Toolbox, 2014*)

### What does this mean?

- Monitor what is going on in the broader community. Tie your issue to related events.
- Be creative in how you promote your message. Interesting events and activities gain more attention. (*Community Toolbox, 2014*)

### Understand All Sides

It is vitally important to understand all sides of the argument for your issue. For example, if your group would like the municipal government to pave shoulders on major routes in your community to create bike lanes, understand the costs and impact on the county's budget for this issue. Know if this would cause additional concerns around drainage or road easements. Understanding what your opposition will be is important so that you can address their concerns, or be prepared with counterpoints. (*Community Toolbox, 2014*) (*Personal Communication with Pathways for People, 2015*) (*Chapman, 2004*)

### What does this mean?

- Become knowledgeable about all aspects of your issue.
- Be respectful of what you do not know – after all, you may know the issues, but it might not be possible to know how the issue works within an organization or municipality.
- Learn about the issue, your proposed solutions, and who and what will be affected by changes.
- Talk with people on all sides of the issues to understand underlying concerns and historical challenges. (*Community Toolbox, 2014*)

### Be Who You Are

You and your organization are concerned about community issues and are important members of that community. Be true to that perspective. Although you have tried to learn as much as you can about the issue, you may not be as well informed as staff who work on the issue day in and day out. Your expertise is as a community member and your understanding of healthy public policies. (*Community Toolbox, 2014*)

### What does this mean?

- Be authentic. Your value as a concerned community member is significant to decision makers.
- Speak to your issue, but be careful not to be pulled into broader discussions that are outside of the scope of your issue area and expertise – that of being a concerned citizen. (*Community Toolbox, 2014*)



## 8. Municipal Advocacy Context in Haldimand and Norfolk

**H**aldimand County and Norfolk County are rural, primarily agricultural municipalities in southern Ontario. How individuals, community organizations and groups advocate in these communities will be different in some important ways than how the same individuals and groups would advocate in larger cities and communities, or in communities in northern Ontario or other provinces and countries.

From a healthy communities' perspective, it is important to know who is responsible for delivering and overseeing public health services, and the development of healthy public policies, in each County. The Health and Social Services Department, which includes the Haldimand-Norfolk Health Unit, Haldimand and Norfolk Social Services and Social Housing, provides services for both Haldimand and Norfolk counties. Norfolk County council acts as the Consolidated Services Manager for the Health and Social Services Department and is also the Board of Health for the Health Unit.

To keep Haldimand County informed about health and social services activities, the Health and Social Services Advisory Committee, comprised of three councillors from each County, receives reports and discusses matters that are related to the delivery of services provided by the Department. Decisions about the direction and services of the department, and the Health Unit specifically, are made by Norfolk County's municipal council.

Both the [Haldimand County](#) and [Norfolk County](#) websites list their different departments, committees and advisory boards. If your issue is governed at the municipal level, understanding what each of the departments and committees do, and how they impact your issue, is important. You can review the information on the website, talk to your ward councillor, or contact the county clerk for more information. A useful approach is to review the council meeting minutes. This will help you to understand how each of the council's work, and the processes they use, even the terminology that is used during meetings. Minutes of council



### Pathways for People - Tips for Advocacy Success:

- Be well prepared
- Have people on your side – and ready to demonstrate their support
- Make yourself known to decision makers
- Be a credible and trustworthy source of information
- Have a public presence, beyond key stakeholders
- Consider your job to be helping decision makers to have no choice but to say yes
- Even a failure is a success – you have learned important information (*Personal Communication with Pathways for People, 2015*)



meetings are available on each of the county's websites.

## 8.1 Successful Local Policy Initiatives

There have been several successful policy initiatives in Haldimand and Norfolk counties. In this section, brief summaries of these initiatives may provide ideas for how your organization or group can take action for your policy area.

### Norfolk Pathways for People Advocacy Efforts

Norfolk Pathways for People is a community coalition that advocates for the development and improvement of connected pathways in Norfolk County. Since forming in 2008, Pathways has advocated for Active Transportation extensively. Some of their activities include:

- Hosting public trail events and educating attendees on the need for continued improvements
- Encouraging trail event attendees to sign up for electronic newsletters and to LIKE their Facebook page

- Attending open house sessions to review plans for projects such as road reconstruction
- Making deputations to Norfolk County council in support of sidewalk installations during road reconstruction
- Providing input on Official Plan Review 2015 and Active Transportation Master Plan
- Asking Council to approve the Share the Road signage program throughout Norfolk County
- Consulting on Norfolk County's Sidewalk Installation Policy (*Personal Communication with Haldimand-Norfolk Health Unit Staff, 2015*) (*Personal Communication with Pathways for People, 2015*)

Through these efforts, Pathways for People has become a respected community group, trusted by Norfolk County council to provide input to, and commentary about, Active Transportation in Norfolk County. (*Personal Communication with Pathways for People, 2015*) Visit their [website](#) to learn more about their activities.



#### Aspects of a good policy

- It works!
- Economically feasible
- Politically acceptable
- Socially acceptable
- Administratively and technologically possible (*Public Health Ontario, 2012*)





## **Please Be Seated, Haldimand Norfolk's Car Seat Safety Campaign**

Haldimand Norfolk's Please Be Seated Car Seat Safety Committee is a demonstration that persistence – and passion – are critical components of the policy process. Starting in 1998, the Committee began advocating for booster seat legislation for children aged four to eight to prevent motor vehicle injuries among young children. Because car seat safety is legislated at the provincial level, the Committee had both a local and provincial component. *(Marks, 2015)*

Locally, the Please Be Seated Car Seat Safety Committee met with their local Members of Provincial Parliament, and their staff, on a regular basis. The purpose of these meetings was to inform policy makers about the evidence supporting car seat legislation, and legislation opportunities that would address the issue. Ongoing meetings kept local Members of Provincial Parliament informed about the issue, and how local advocacy groups were continuing to advocate in support of the legislation. When the Committee attended meetings to discuss the issue at the provincial level, they made sure that their local representatives were aware of their activities, and visited with them too to continue to pursue their cause. *(Marks, 2015)*

At the provincial level, the Committee met with relevant Ministers, their political and administrative staff, and stakeholders from all parties. By maintaining an ongoing presence with all provincial stakeholders, the Committee ensured that when changes in the governing parties occurred, their advocacy efforts could continue with the new government. Importantly, the Committee made use of any and every opportunity – formal and informal – to meet with both local and provincial Members of Provincial Parliament. This included fundraising golf tournaments and community events, even when the issue of injury prevention and car seat safety was not on the agenda. *(Marks, 2015)*



Five years after they began, the Please Be Seated Car Seat Safety Committee's passion and persistence paid off when the provincial government passed Bill 73, Ontario's Child Passenger Seat legislation. In 2006, the Committee's efforts were recognized by the Safe Kids Canada for Community Advocacy. *(Marks, 2015) (Personal Communication with Haldimand-Norfolk Health Unit Staff, 2015)*

## 9. Final Thoughts

Doing advocacy uses the skills and approaches that many individuals use in different parts of their lives, just applied to a different process and audience. The steps and processes outlined in this resource provide a guideline and framework for applying these everyday skills and approaches within a policy context, and provides links and samples to help advocacy groups apply these ideas.

It is important to note that leadership in healthy public policy is often most effective when it comes from community members, rather than public health staff. People employed by organizations are sometimes constrained in what they can do to support advocacy efforts with their employer. The importance of citizen advocates cannot be understated. Public health and other staff can provide support for and information about issues, but the perspectives of members of the public or targeted community who stand up and demonstrate their support and desire for a healthy public policy change are highly regarded by decision makers, especially elected officials.

For more information about advocacy for healthy public policy in Haldimand and Norfolk counties, contact the [Haldimand-Norfolk Health Unit](#).





# Appendix A: Municipal By-laws

The province of Ontario authorizes local municipalities to address and resolve a wide range of issues, many of which have an impact on health. Some of these areas include highways and transportation systems, waste management, public utilities and the health, safety and well-being of persons within its municipal areas. People interested in changing healthy public policies often work on municipal by-laws. Municipal by-laws are a type of legislation which are passed by an elected municipal council. Passing a by-law follows a formal, legal process. (*Public Health Ontario, 2014*) (*Hegel, 2003*)

## Municipal Advocacy Process

Advocating at the municipal process follows the same advocacy steps as general healthy public policy advocacy, but with a broader audience (the whole community) as the community of interest. Some specific processes must be followed when the by-law is developed and formally introduced at municipal council. (*Bergeron, 2014*) These processes vary by municipality. Visit [Haldimand](#) and [Norfolk](#) counties' websites to learn more about their by-law processes. The by-law processes can change, so check with the county clerk to make sure that the process outlined is up-to-date.

The municipal by-law process outlines how and when the issue comes to the council's attention, how the by-law is presented, whether there is a public notification and consultation process, and the actual legal process of readings, question periods and votes at the municipal council table to pass the by-law. (*Bergeron, 2014*) Often, by-law issues come to council through staff reports (*Personal Communication with Haldimand-Norfolk Health Unit Staff, 2015*). A good relationship with the county clerk is important. It is their job to ensure that procedures are followed.

During the municipal by-law process, one of the most important steps is the deputation. The deputation (a presentation to council that can be a written submission, or an oral presentation, or both) is the key way that a community advocacy group can publicly present their case. Making



Public Health Ontario offers three useful resources for by-law development:

- [Municipal by-law development and public health: A primer](#)
- [Focus on by-law development as a health promotion strategy](#)
- [At a Glance: The Eight Steps for Developing a Municipal By-law](#)

Public Health Ontario also offers workshops and webinars [on how to develop a by-law process](#)



## Tips on developing by-laws:

- Contact the county clerk to get a template for a by-law
- Use existing by-laws from that specific municipality as an example for your by-law
- Review the draft with the clerk to see if you have addressed the procedural aspects of developing the by-law

a deputation is a formal process, usually with a predetermined time limit. You will need to let the county clerk know that you are submitting a deputation, and there are deadlines for submission to make sure the information is received by councillors in time.

Reviewing agendas and minutes from previous municipal council meetings can help to understand how each municipal council works, and the processes that they follow. [Haldimand County](#) and [Norfolk County](#) each post their agendas and minutes online.

## More Information

For more information about municipalities, their responsibilities and the issues that municipalities address, contact:

- [Association of Municipalities in Ontario](#)
- [Association of Municipal Managers, Clerks and Treasurers of Ontario](#)
- [Ministry of Municipal Affairs and Housing](#)
- [Federation of Canadian Municipalities](#)

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