

Part IV

Lessons in Strategies and Leadership

Vincent DeMarco is no revolutionary; he's not even a radical. He does not pretend to have the key to long-term fundamental systemic change, such as a Canadian-style single-payer health-care system that every disinterested, sober expert agrees would be vastly superior to what we have now; or the nationalization of the tobacco industry, which David Kessler as FDA commissioner argued is the only way to tame the tobacco demon. Nor can DeMarco help much in confronting those issues that deeply and evenly divide us: immigration, gay marriage, abortion, or the redistribution of wealth through more progressive taxation.

DeMarco's skills and strategies come into play where there exists broad, generalized popular voter support for policy change that the power of threatened interests has thwarted. Under such conditions, DeMarco goes about mobilizing and focusing that public sentiment into a political force capable of counteracting the power of the lobbies. While DeMarco may not be a political radical, he undertakes these campaigns in ways *radically different* from those that most progressive issue advocates have grown accustomed to, whether or not they have proved effective.

The DeMarco Way

DeMarco has done most of his work in Maryland, a comparatively wealthy state, predominantly Democratic in its politics. The state has a relatively strong labor movement. It has a large urban culture. It has diverse communities of faith, some of which have been histori-

cally active in policy advocacy, individually and collaboratively. It has had progressive newspapers both covering and weighing in editorially on the campaigns DeMarco has waged.

Thus, it's fair to ask whether the strategies DeMarco developed in Maryland have much to teach advocates in other states, or in countries with greatly differing social and political structures and traditions. We have only part of the answer to this question when we looked at the success of his strategies in other states and in Congress through his work with TFK. After all, it would be harder (though DeMarco thinks not at all impossible) to get the Southern Baptists who were indispensable in much of the tobacco control wars to join the ranks of other progressive social justice campaigns such as health-care reform. Yet the short answer to how much these strategies have to teach advocates in other places is: *a lot*. Especially useful are the comprehensive advocacy campaign planning, the boundary-stretching organizing, the integrated and relentless media advocacy, and the focus of campaign energies on elections before lobbying.

The Nine Questions

As I suggested in the introduction, one way to gauge the general applicability of the DeMarco techniques is to compare them to a proven method of strategic planning for policy advocacy campaigns, the “Nine Questions” developed by Jim Schultz of the Democracy Center. The questions continue to evolve, with variations, over time. With Schultz’s permission, I describe the Nine Questions here, taking some liberties but essentially naming them as he conceived them. Questions 1 through 5 look outward at the political and media environment within which the policy campaign must be waged. Questions 4 through 9 look inward at the development of a political force strong enough to overcome the external barriers it is likely to encounter.

Looking Outward

Question 1. Objectives: What do we want now? If an advocacy campaign is to achieve anything significant, the question “what do we want now?” often turns out to be the single most important, time-consuming—and difficult to answer—of the Nine Questions. This is not a question about what we want ultimately—however important a grand, long-term vision is—but what we want *right now*

(although still bearing in mind what we want next, and what we want ultimately). Is this near-term objective significant enough, yet realistically achievable in the short term, to fully engage the energies of supporters?

Question 2. The target audience: Who has the power to give us what we want? Who has the power to make what we want happen, and who has the power to stop it from happening? This means those who have constitutional power (for example, governors, legislators, and, at election time, voters). It also includes those who have real power—formal, if not constitutional—such as the elected majority leadership of each legislative body, committee chairs, and indeed, all legislators.

Question 3. The messages: What do they—the holders of power—need to hear? Moving these different audiences to act requires crafting and framing a set of messages that will persuade each of them to do what we want each to do. Although we must always root these messages in the same basic campaign themes, we need to tailor them differently to different power holders, depending on what each will respond to. In most cases, advocacy messages have two basic components: an appeal to what is right, and an appeal to the power holders' self-interest.

Question 4. The messengers: From whom do the power holders need to hear the messages? To know each of the power holders well is also to know who has particular influence with them. To whom are they politically indebted and responsive? Who are they most eager to please? Who intimidates them? (To whom are they financially indebted?) Whom do they trust? respect? honor? fear? like? perhaps even love? Who are the staff members who have their ear and trust? Who are the lobbyists they have grown comfortable with? The same message has an entirely different effect depending on who communicates it. Who are the most credible messengers for each audience? In some cases, these messengers are experts whose credibility is largely technical. In other cases, we need to engage the authentic voices who can speak movingly from personal experience.

Question 5. Delivering the messages: how can we get the power holders to hear the messages? There is a continuum of channels through which to deliver advocacy messages to the power holders. These

range from the personal (for example, lobbying) to the confrontational (for example, protest action). The most effective means available to citizen advocates without either special access to the power holders or vast financial resources is often media advocacy, that is, approaching the mass media strategically as indirect channels to the power holders.

Looking Inward

Question 6. Taking stock: What have we got? Campaigns generally don't start from scratch but build on existing strengths, so an effective advocacy effort begins with taking careful stock of the advocacy resources already there to build on. This includes inside and outside leaders, past advocacy experience, networks and alliances already in place, and staff and other organizational or allied capacity, information, and political intelligence.

Question 7. Filling gaps: What do we need to develop? Identifying the advocacy resources we need that we don't have means looking at alliances that we need to build or strengthen, networks we need to expand, and capacities such as outreach, media, and research, which are crucial to any effort. What kind of technical support do we need and where can we get it? And, inevitably, money.

Question 8. First steps: How do we begin? What are our most effective first steps? How do we begin to build now toward ultimate legislative action?

Question 9. Strategic flexibility: What do we do when the plan isn't working, runs into unforeseen roadblocks, or confronts unanticipated opportunities? As do any travelers on a long journey, campaign organizers need to check their course at every stage. They need to reevaluate strategy, revisiting each of these questions (Are we aiming at the right audiences? Are we reaching them? Are we building the support we hoped to build?). They remain open to the need to adapt their plan and their campaign to new events, shifts in inside and outside personnel, and change in general.

About Part IV

DeMarco does not consciously ask these Nine Questions in the form that Schultz asks them. Yet, in the next three chapters, we will see that his strategies and tactics answer each question as each campaign begins and unfolds—so clearly that an advocate who has read the case studies in Parts I, II, and III of this book could design and implement an issue campaign, readily putting DeMarco's strategic innovations in place by following the Nine-Question planning method.

In Chapter 12, we examine how DeMarco goes about providing answers to the first four “looking outward” questions. Chapter 13 examines how DeMarco's strategies respond to the fifth question, focusing on lobbying and media advocacy. Chapter 14 assesses DeMarco's strategic response to the four “looking inward” questions.

Chapter 15 turns toward campaign leadership. DeMarco is unique in many ways, yet here are replicable campaign leadership lessons to be drawn for aspiring campaign leaders, especially in recognizing their own leadership strengths and acknowledging what missing leadership roles they need to reach out to others to fill.