Advocating for Occupational and Environmental Medicine

A toolkit for Occupational Medicine Societies

Draft for comment

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1 Background

Occupational Medicine (OM) societies, in all countries and regions, have unique opportunities to advance the missions of their organization by engaging in effective advocacy. All societies regardless of philosophy or size may benefit from a basic understanding of the principles of advocacy, recognizing that the scope of activity will be tailored to the organizations resources and to particular institutional arrangements within their country. The potential benefits of advocacy are substantial. These benefits may include:

- Increasing resources for occupational health overall, helping to build the case for an OM model, especially in areas where OM it is not well understood;
- Effecting needed improvements in policies and practices;
- Increasing occupational medicine organization's profile amongst other health professionals, the public, the donor community and influential groups; and
- Drawing attention to specific problems faced by the working population at the worksite and in the communities where they live.

The purpose of this document is to articulate the basic elements of advocacy, that might be common to all OM societies, and to describe some basic approaches, techniques and activities that may be particularly effectives, recognizing that all advocacy efforts will need to be tailored to local circumstances. (Attached this document is a series of Appendixes that provide more detail, in a step by step fashion, that may provide a useful guide to IOMSC members as they continue to develop and fine-tune their advocacy efforts.)

The IOMSC believes that advocacy is important, not only to achieving any particular goal or policy objective, but that over time advocacy efforts can help educate the public as to the critical role that OEM plays in improving the health and well-being of workers, ensuring the safety of work places, and in protecting the environment. While the IOMSC is aware that many of its member societies already engage in active advocacy, it also believes that there is room for substantial expansion, especially at the more local levels. For example, a study by ACOEM in 2012, showed that of its local (state based component societies) only 38 percent had submitted comments to a state regulatory agency in the past year, and only 15 percent reported having met with a government official. Yet it is precisely those issues of such great importance to OM that are best, or perhaps even only, addressed through advocacy programs.

To help encourage more active advocacy efforts, as part of its programmatic activity, the International Occupational Medicine Society Collaborative (IOMSC) maintains a clearinghouse of advocacy activities that member societies are encouraged to contribute to, and to draw from.

OM societies planning advocacy activities should be aware that jurisdictions may often put limits on the amount of advocacy that can be performed by a medical society based on their incorporation and/or tax status. Some might note specific and important differences between what is commonly considered "advocacy" and those activities that may be considered formal "lobbying." Before embarking on any type of advocacy campaign it is important that the society understand any such limitations, seek legal advice as appropriate, and scale their activities accordingly.

2 What is Advocacy?

Advocacy can be defined as a broad set of activities organized "to influence policy makers to design, adopt, implement or change policies and practices". Policy makers may be within the public or private sectors and can be on any level e.g. a state or local jurisdiction, ministry of health, a national parliament, a multilateral agency or indeed any other type of organization. In

essence, advocacy is the act of identifying a problem, and constructively engaging in a series of externally focused activities designed to compel decision-makers to move toward a more appropriate alternative policy. Most commonly advocacy will include important elements of:

- Campaigning – speaking publicly on an issue with a view to generating a response from the wide audience;
- Educating and informing—promoting awareness and understanding of issues from the occupational medicine perspective to those in a position to make a difference; and
- (As noted above), may or may not, include direct contact with legislators for the purpose of influencing a specific piece of legislation.

Generally speaking, advocacy should be viewed as a long-term process for OM societies. Effective advocacy requires a systematic, well-planned approach. One-shot attempts to address issues are unlikely to be effective. All societies will become more successful in advocacy as they gain more experience and sophistication, recognizing along the way that any one particular effort may, or may not, achieve the immediate goals.

3 Models of Advocacy

When considering development of an advocacy programs, OM societies have two approaches to consider.

1. The "build it yourself model" when the society alone selects its top priority issues; creates and supports their own capacity to directly communicate with key constituencies; and directly makes its case to the most influential policy makers; and

2. The "alliance model" whereby an OM society invests in development of a partnership, or a coalition, of multiple and probably larger medical societies and works within that partnership or alliance to incorporate its message in a broader framework.

There are advantages and downsides to each approach.

Under the "build it yourself model" OM societies have complete control over their messages and how they might choose to communicate those. They have the ability to "scale up" or "scale down" depending on overall resources and annual budget cycles. They have complete control of the specific issues they choose to advocate for, and the opportunity to create and their own identity and brand.   To the contrary, societies that choose this approach might encounter legal restraints; find such efforts prohibitively costly, find it difficult to maintain continuity with their own leadership changes, and be challenged to show consistent results, which could ultimately call the entire activity in question from a society priority perspective.

Some advantage of the "alliance" model would include lower overall costs (as these are being shared among many societies); access to substantially greater intelligence gathering; the opportunity to more fully inform other members of the partnership about the specialty of OEM; and lead to collateral opportunities. When diverse ranges of different interest groups agree and work together on a given issue, the message is often more compelling. Some disadvantages might include; the time and resource costs of investing in long-term relationships; costs may be fixed (i.e. a fee to join the alliance) and not subject to annual budget variations; and as one voice of many it may prove challenging to gain maximum attention and the focus of policy makers on the society's issues of primary importance.

These two basic approaches are not mutually exclusive and effective models have been developed where a society engages element of each approach depending on their strategic assessments and resources. A society might, for example, decide to build its own internal

capacity of advocacy, but be open to seeking out or even to forming alliances on very large, multi-year projects.

See Annex 1 Choosing the Most Appropriate Method for Advocacy.

4 Philosophy and Framework: Getting Organized

4a Philosophy. In approaching their advocacy work societies should adopt an overall philosophy that will characterize their efforts. They can take a condemnatory (critical) approach or a collaborative, encouraging approach. In practice advocacy work can combine the two to a greater or lesser extent, for example, highlighting the inadequacies of specific policies and practices, and also suggesting constructive alternatives that would have more desirable effects. Taking a collaborative and supportive approach has in generally considered to be the most effective.

The way in which an advocacy message is delivered can also take different approaches. The first is through direct communication (e.g. talking privately to the policy makers and practitioners) and the second being through campaigning, using the mass media to attract public attention to the issue. Again in practice much advocacy work uses a combination of both approaches. Content, style and method of delivery will vary between and within organizations according to the advocacy targets and circumstances of the specific issue being addressed. However, most organizations will in general find a model within this range that best suits the nature of the organization. For all organizations, whatever approach is preferred, professionalism and respect are crucial.

In addition, whichever approach is taken, a key to successful advocacy is knowledge and the effective use of evidence to back up your position. For OM physicians, this is a tremendous advantage as the application of evidence-based medical practice is a hallmark of the specialty. Uniformed and unsupportable opinion will not bear up to cross-examination by opponents and may cause lasting damage to the OM society's credibility.

An issue, which inevitably influences the model of advocacy adopted by an organization, is that of funding. Those organizations with a heavy dependence on government funding will be less likely to take a confrontational approach using the mass media and more likely to take an encouraging, inspirational approach. In these situations, criticism of government policy is more likely to be restricted to face-to-face engagement.

4b Identifying the Objective. When advocating for a change within an institution, such as a government department or a hospital, objectives typically fall into two categories:
- Policy change objectives; and
- Practice change objectives

In most cases, an institution that is the subject of an advocacy effort, would need to adopt a new policy before it changes its practice. Therefore policy change objectives may be seen as an initial goal, with change in practice being the end point that, in turn, can lead to change in the situation of the beneficiaries. Optimally, having been the organization that has helped craft a policy change, and thereby having achieved some level of credibility, the OM society will be well positioned for the opportunity to be engaged in the more detailed work of practice change or drafting of detailed regulations.

4c Why and When. Wherever change in policy and /or practice needs to occur, advocacy has a role to play. Government policies at a national and/or local level can restrict good occupational health and medicine practice. Advocacy has a vital role to play in demonstrating the effects of policies and ensuring appropriate policies exist to enable good occupational health and

medicine to take place and be available to all who need it. Advocacy is needed to create a policy environment, which will make practical work as effective as possible

Advocacy can most appropriately take place:

- Before or just after an election
- When something happens to bring the issue to public attention
- Before the issue goes public
- Before the issue gets in front of a legislative body
- When legislation is being changed
- On quiet news days
- When you have information and expertise relevant to the issue
- When the target audience are potentially interested in the issue

4d Targets. Advocacy efforts should target the decision-makers involved in the issue identified. It is important to remember these will be either elected or career individuals and it should be assumed that they take their responsibilities seriously.   It is vitally important, though not always straightforward, to identify which specific individuals have the authority for ensuring policies are implemented appropriately and the individuals who have the authority to change legislation or regulation.

It will assist in developing an advocacy message that will appeal to your target audience if you learn as much as possible about these individuals. For example, what are their political interests and what group of people do they represent? Do they know anything about your issue already, have they already taken a public position on the issue, can you link your issue to something you know they support.

4e Delivering the Message. Credibility to represent the issues on which you wish to advocate is vital. As referenced above it is critical that arguments presented to policy-makers are evidence-based and that you provide the appropriate materials to support your points. Basic messages should, generally, be delivered by an individual(s) in the society who will be clearly accepted as speaking on behalf of the society. Delivering effective advocacy messages is a particular skill that the OM society should seek to develop and to make part of its core competencies, through external training programs, etc.

See Annex 4 Setting up and Conducting a Face-to-Face Meeting

When possible, it is often helpful to involve the people directly affected by the advocacy issue or problem. The people affected by an issue or problem, other people representing them, or by both groups together can carry out advocacy. Advocacy is often more powerful if those affected by the problem or issue are involved with or lead the process. For example, if a society were advocating for policies that would improve the cardiac conditions of workers, it may be useful to engage a patient advocacy group that focuses on closely related health issues.

If you plan to advocate on behalf of others you need to ensure that you represent their opinions and interests fairly. This means having a close relationship with those affected by the problem or issue, a deep understanding of the issue for their perspective, and permission from those affected by the problem or issue to include their positions in your own communications efforts.

See summary of benefits and potential pitfalls below:

Why it helpful to involve those directly affected by the advocacy issue, from early in the planning process?

- They will have added expert knowledge of the issue or problem
- They can suggest workable solutions based on direct experience of the problem
- They can view a problem from a different perspective
- They are often highly motivated, because they are directly affected by the issue

Pitfalls to Avoid
Involving those affected by the problem superficially ('tokenism') or not at all can result in:

- Identifying irrelevant issues
- Suggesting solutions which do not solve the problem, or make the problem worse
- Public disagreement
- Loss of credibility for the organizations and individuals involved in advocacy
- Increased stigma and legitimised exclusion and non-involvement of those affected by the problem or issue
- Disempowerment of those affected, so end up being less in control of their own situations.

4f Setting the Framework. There are a number of steps to take once you have decided to undertake advocacy work. Collectively, these types might be referred to as "setting your framework." Seven important steps are listed below.

1. Issue identification. E.g. lack of OM doctors. Deciding which problem or aspect of a problem to address. Your advocacy efforts will be more effective if the problem is very clearly defined and is closely connected to your area of expertise.

2. Analysis. E.g. on workplace health. This is essential for making informed decisions when choosing which issue or aspect of an issue to work on, identifying solutions to the problem and setting a realistic goal and objectives. Good, credible data is essential to put together a persuasive argument. It is important to select the data that can be used to best support your argument and to plan how this data will be gathered.

3. Developing the message. Think through, carefully, what do you want to say and how will you say it. Different audiences respond to different messages, e.g. a politician may become motivated when they know may people in their district care about an issue. It is important to decide what type of message will best encourage your target audience to act as desired. Careful and thorough preparation of convincing arguments and a clear presentation style is required.

Developing a clear and compelling message is vital to the success of your advocacy work. Your message should explain what you want to change, why, and the benefits of doing this. Messages will need to be reviewed regularly and revised as you learn new things about your issue or your target audience. In just a few sentences your message should say why your issue is important and what you want others to do in support of the issue. It should give the audience a clear choice of actions and explain the consequences of these. Your message should take into account the interest and knowledge of your target audience and it should be short and simple.

4. Goals and Objectives. The goal is the vision for the future, and what it is hoped to achieve over a long period of time, 10-20 years perhaps. E.g. access to OM for all. The goal needs to be clear and to encompass what you are trying to be achieved. Problems can be complex and the goal often may be long term.

The advocacy objectives are what the organization wants to change in the shorter term. The objectives must be narrowed down into things that are achievable within the project timeframe; they should be specific and measurable and clearly address the problem identified. A number of solutions may present themselves the advocacy will be most effective if the solutions which are most politically, economically and socially feasible are identified.

5. Finding Allies. Building political support to act on the problem is a key stage. Actions should include coalition building, meeting with decision-makers, awareness building and delivering effective messages e.g. with industry and trade bodies. The power of advocacy is increased in the numbers of people who support the objective. Even within an organization internal coalition building can help build a consensus for action. Suitable allies need to be identified, such as other groups who may share a desire to achieve the advocacy objectives.

6. Identifying resources. Advocacy requires resources. Sustaining an effective advocacy effort over the long-term means careful planning of cost implications. It is important to think through all the costs and resources, which will be required. These need to be budgeted for and potential funding sources identified.

7. Creating a plan to monitor and evaluate. The timeframe needs to take into account important points in for example the parliamentary calendar. It is important to know if and when the advocacy objective has been achieved and to continually assess how the advocacy strategy can be improved. A system should be put in place to ensure feedback and evaluations of the effectiveness of the strategy employed. You need to be clear how it will be known when the objectives have been achieved.

Key Factors to Effective Advocacy

- **An effective message**. A concise and persuasive statement about the advocacy goal that captures what it is wanted to achieve and why. The message should be tailored to each audience, in an appropriate delivery format and should include a specific action for that particular audience.
- **Identification of advocacy target audiences**. The primary audience are the decision makers with the authority to affect the outcome of the goal and objectives directly. It is important to understand their decision-making processes and to organize your efforts accordingly.
- **Demonstrating the credibility** of your organization(s) in advocating on an issue. You should be able to demonstrate a clear platform for addressing the issues you are supporting. This can be from experience of working in the area affected by the issues and/or partnership with other organizations working in the area. You need to clearly explain and demonstrate who you represent and why policy makers should take your positions seriously.
- **Effective use of data**. This should be from a source that your target audience perceive as credible. It should focus on a few questions that can be answered and address the information needs of the policy makers. Ideally it should be presented in a way that emphasises the lessons learned.

5   Advocacy Tools

Methods and approaches to advocacy work will vary depending on the type of organization you are and the advocacy plan you have developed. In advocacy it is important to be clear about who is responsible for what and to ask (advocate) for what is appropriate and reasonable.

Described below are summarizes of some practical advocacy tools that can be used by OM societies. The tools have been divided into 5 areas.   In practice, an advocacy strategy would involve a variety of tools from some, or all, of the areas.

1. Directly Influencing Policy
2. Monitoring State Performance
3. Providing Information and Training
4. Demonstrating Good Practice
5. Public Education and Awareness Raising

5 1   Directly Influencing Policy

The tools included in this section are those which can be used to directly talk to the policy makers, ideally, at times when they are receptive to ideas or in a position to make the policy changes desired. Many countries have health care systems that are in transition and sometimes this can provide good opportunities for policy change or creation. Some key elements/tools that enable effective influence are described below:

Understand your legislative or rule making process
It is important to understand the effects of an existing policy or law and its implementation. It is also important to understand and to be able to explain the likely effects of proposed new policies or laws. Policies and legislation may not always be written down. In some instances, actual practice may be based on traditional laws and customs or decisions communicated without being written down. These kind of policies are harder to analyse as there may be fundamental disagreement on exactly what constitute the current "policy".

See Annex 2 Analysing a Law, Policy or Regulation

Advocates should try to:

a. Agree what the policy or law is, or how it is implemented
b. Analyse the policy and / or its implementation
c. Suggest how it might be improved
d. Suggest how it might be implemented better
e. Seek to get it written down, to avoid future misunderstandings.

Position Papers
A position paper is a formal, written record of the opinion of an organization. In certain situation, a position paper may help show that a coalition of many different allies support the same advocacy objectives. Position papers are written specifically to be read by the advocacy targets. Depending on particular circumstances, position papers may be:
1. Left with an individual decision-maker at the end of a face-to-face meeting to summarize the main points of your message.
2. Be sent to local or national governments during consultation.
3. Be sent to people in influence, in response to a policy or action, to explain an alternative or supporting a position.
4. Be given to delegates or committee members at a meeting or conference – whether or not you are allowed to speak at the meeting

Working inside the System

Participating in decision-making bodies can be one of the most effective ways of influencing policy change. Decisions affecting your advocacy issue may be made in many different situations, for example, sub-committees and working groups, district health committees, social welfare committees, advisory committees to government agencies. It is important to find out when and how decisions are made, and then to find out your representatives can participate at key meetings. Participation can help further credibility and to demonstrate good faith on the part of your organization. Take full advantage of official positions already enjoyed by members of your organization or coalition. It may also be possible to invite receptive members of decision-making bodies to become involved in your organization or coalition.

Direct Contact

Making direct contact, and building a professional relationship with key individuals who are responsible for taking the decisions you wish to influence is another very effective way of achieving policy change. There are 2 main ways of doing this; communicating through letter writing or e-mail; and requesting a face-to-face meeting.

52 Monitoring Performance

Even when adequate policies are in place or appropriate guidelines are accepted, actual practice may not match up to these. Highlighting these differences can be an important method for encouraging policy implementation to improve. The keys to using these tools are;

- Understand very well what international and/or national guidelines have been accepted.
- Know which policies are intended to guide implementation
- Have clear and credible means of gathering information on actual implementation of policies.

Improving Government Transparency

Helping encourage greater transparency can be an effective way to increase the availability of information about the making and implementation of government policy that may be well received. Activities can include the discovery, publication and dissemination of information about items of legislation, legal provisions, public expenditure allocations, the implementation of policy and programs, and special enquiries. Enhanced transparency in government may contribute to more effective implementation of health policies by helping citizens monitor the delivery of development resources and staunch the appropriation of resources by bureaucrats and local elites.

Monitoring guidelines and policies in other jurisdictions.

International comparisons are often powerful tools. The policy environment can be measured and comparisons made with other countries, or even with geographic regions of the same country. This idea can also serve to see if an authority has adequately addressed its obligation to adopt national policies and international guidelines.

Public Participation

Increasingly ideas of governance and accountability focus on forms of broader interaction of public and private social actors, especially at the local level. Public participation in this sense involves direct ways in which citizen's influence and exercise control in governance. This means creating possibilities for public dialogue. This approach acknowledges the importance of the

state and supports those entitled to the services to demand and negotiate directly with government for greater performance and accountability.

5 3 Providing Information and Training

Much of the advocacy work undertaken by occupational health and medicine organizations is about informing and educating decision makers on issues such as what occupational health and medicine is and what policies are needed to support organizations to provide appropriate palliative care. Often policy change can be brought about when officials better understand the issues involved and the reasons why particular policies present difficulties for providers of palliative care. The keys to using these tools are;

- Target the decision makers and those who influence them.
- Ensure the facts you use are correct and up to date.
- Provide information from sources your decision makers will trust.

Production of reports

Reports that draw together research and highlight situations can be an effective tool to highlight key issues to interested individuals. They can be an effective means to illustrate differences between countries that may be a useful tool in lobbying government officials.

Websites and Maintaining Databases of Information

Many organizations, particularly those concerned with campaigning and advocacy use their websites to make information available to others, and to gather and collate information. Increasingly, social media such as Twitter and Facebook, have become important supportive tools for communicating messages broadly.

Inviting Key decision makers to attend International meetings.

Providing the means for decision makers to access information at an international level and to network with decision makers from other countries can enable them to make comparisons with other countries and see what can be achieved. This tool is particularly important in resource challenged countries were lack of finance can be a real obstacle to gaining access to up to date information and ideas.

Organising Conferences for Educating Decision-makers.
Organizing conferences and workshops within your own country for decision makers and practitioners can be a successful way of bringing groups together to learn from one another. It also provides a forum for sharing knowledge, ideas and guidelines and for the general awareness raising among key elected and government officials.

Providing professionals with access to information

Often an authority may be supportive of a policy or of occupational health and medicine as a practice but lacks the resources to provide the information and the support health care professionals require. By providing access to the appropriate information and training materials, in the correct language, occupational health and medicine practice may be improved.

Release of statements and findings

The outcomes of conferences and workshops can include a "summary of findings." Such "findings" may be a statement of intent or presentation of the desirable situation to which

participants intend to work toward, and to which they would like to encourage others to work cooperatively.

5 4 Demonstrating Good Practice

Excellence in providing clinical care and in occupational health and medicine professionals own work is crucial as a platform from which to advocate for policy change. Showing how good occupational health and medicine can be cost effective can also be an important catalyst for policy change. The key to using these tools are;

1. Having impeccable occupational health and medicine policy and practice of your own or of the organizations you represent.
2. Communicating effectively how practice could be incorporated into national policies.
3. Being able to present data that show the outcomes differences that adherence to the principles and practice of OM can generate.

Enhancing State Performance

The quality and effectiveness of public services and expenditures can be contributed to by working directly with government in shaping, financing and delivering public services in a variety of ways. These can take the form of public-private partnerships in which civil society organizations work closely with state institutions in designing and providing health and educational services, by mobilizing funds from among client groups and other sources, by providing services directly

Self-provisioning and Piloting Practice to Demonstrate it Works

A method of advocacy that has proved effective is to use what space is available to develop solutions to problems, rather than to engage directly against state policy. In other words, to start a service independently to demonstrate how it can work in practice. Once the service is running effectively to ask the authorities to start funding it or to take it into the state health service.

5 5 Public Education and Awareness Raising

If influencing public opinion is an important part of your advocacy strategy then you will need to use the media. Policy makers often pay close attention to the media so using the media may assist you to reach several target audiences at once. Using the media will enable you to reach large numbers of people and should enable you to gain the publics attention for an issue. It may also assist you to gain credibility with your primary target audiences. Using the media also brings risks as there is always the possibility that your organization or cause will be inaccurately or unfavourably represented.

Media Strategy

There are several ways in which you can use the media and the methods you chose will depend on the audience you want to reach, the media that is accessible to you and the nature of your message. You need to consider all of these factors and develop a media strategy. This can include actions such as;

1. Interest a reporter in your story
2. Pitch a story to the media
3. News Advisories
4. Press releases

5. Be available for interviews
6. Press Conferences
7. Write a commentary or position statement

See Annex 5 How to write and use a press release and Annex 6 How to carry out a media interview

It is important that you:

1. Target the right media and journalists
2. Give them information in the format they want
3. Provide good spokespeople
4. Timing is crucial
5. Know their deadlines
6. Monitor your media coverage
7. Link your media campaign with other relevant events
8. Make pictures that tell your story available

Profile Raising and Fundraising Events

These can be on a local, national or international level. Organising an event provides a focus around which to direct public and media attention to a cause.

A designated day around which to focus attention

A day designated to a particular cause to provide a focus for organizations, often globally, to raise awareness of the key issues related to that cause. Often this type of awareness raising event is held annually, for example, World Aids Day.

Public Education through the arts

Highlighting the issues around injury, Illness and occupational health to the general public can be effectively achieved through the arts. By using plays, television programmes, films and other art forms to illustrate issues the mass media can effectively be used to reach large portions of a population with key messages

Annex 1
Choosing the Most Appropriate Issues and Methods for Advocacy

Selecting the Topics
In general, advocacy efforts will be most successful when the Society's Board consider the potential for advocacy from a diversity of viewpoints and perspectives. For example, Society members may include university faculty, corporate medical directors from a variety of industries, employees of government agencies, physician employees of hospitals and large medical groups, and proprietors of solo or small group practices who are thus small business owners as well as physicians. Such constituencies may see the same issue in very different ways.

Accordingly the Society might target for advocacy those positions that have the broad support of Society membership, and avoid initiating advocacy efforts on issues that may be unnecessarily divisive.

Examples of Potential Advocacy Issues
Below is a working list of issues that may be of special interest to OM societies, and that they (i.e. the Society) may be able to influence or impact through an effective advocacy programme. Each Society should develop its own list and priorities. It can also be helpful for the Society to focus its efforts by preparing a more formal advocacy agenda (one page is best) that serves as a public statement of needed changes. The advocacy agenda might then be posted on the Society's website and circulated to a variety of audiences, including members, elected officials, and key government staff.

- *Procedures and rules pertaining to Workers Compensation and similar, programmes;*
- *Proper recognition of OM services in health insurance programmes and in medical fee and payment schedules*
- *Inclusion of OM services in electronic medical record systems*
- *Issues related to scope of practice in the area of OM affecting physicians and other health care providers, including: Occupational Health Nurses, Physician's Assistants, etc.*
- *Proper recognition of OM as a specialty of medicine, including ensuring an adequate supply of OM trained physicians and adequate funding for graduate medical education*
- *Funding for occupational or environmental clinics;*
- *Disability evaluations, "sick notes" and fitness-for-duty issues.*
- *Environmental issues including human exposures to chemical or physical agents and pesticides; air and water pollutants, hazardous materials and hazardous wastes.*
- *Public health issues with an environmental component (such as land use issues, the built environment, global climate change, and others).*

Selecting the Best Methods
Once an OM medical society has settled on an issue appropriate for advocacy it will need to choose the method(s) that is likely to be most effective. There are no simple rules for choosing, the choice will depend on factors such as:

1. The nature of the particular advocacy issue itself
2. The specific objective;
3. The target person, group or institution;
4. The availability of scientific or other evidence to support the objective;
5. The skills and resources of your staff, leaders and/or coalition; and
6. Timing – for example, external political events, when a law is still in draft form, immediately before a budgeting process, time of year, and stage of advocacy

process.

Putting Advocacy to Work
To help illustrate how the potential topics and tools might work together, below is an example of a potential advocacy issue along with brief comments on strengths and weaknesses of some of the methods described above. Societies might find this useful as they evaluate the relative merits of their own advocacy agenda and plans. Remember that every case (issue) is different and that the specific approaches need to be tailored accordingly. Tools, of course, are not mutually exclusive.

Advocacy Objective: *Persuade large companies to end their practice of compulsory testing and subsequent refusal to hire and/or dismiss HIV positive workers.*
Direct targets of campaign: General managers of companies.
Indirect targets of campaign: Labour unions, Boards of Directors, Human Resource managers.

Methods: Strengths and Weaknesses

1. Analysing and influencing legislation and policies or their implementation.
The Society might be able to present scientific evidence pertaining to the acquisition and potential spread of HIV. Also powerful, would be any available evidence to show the HIV infected workers do not have reduced productivity. (High performance employees, that current test positive, would be excellent examples). It might be possible to make the case that limiting their pool of potential employees might negatively impact the company's longer-term financial performance.   (High performance employees, that currently test positive, would be excellent examples.)

The advocacy team will need to be aware that company managers may be inherently resistant to external criticism of company policies and dismiss such analyses as not being relevant (i.e. "you don't understand our business"). Such approaches will also not be especially useful for managers who view formal policies, in any form, as an intrusion on their managerial prerogatives.

2. Developing a position paper or set of briefing notes.

  .   This approach can be very effective for presentation to senior directors and managers. Position papers can also be well received by journalists who often rely on such documents for developing articles, etc. Having a written document also helps ensure that your public statements can be shared (reviewed) in advance and agreed to by potential allies.
  .   On the downside it should be recognized that some managers will resist reading externally produced documents. Also such documents can be easily be lost or readily discarded. By definition such an approach limits the ability of "beneficiaries" to be personally involved.

3. Working from the inside.

  .   Engaging someone from inside the organization, as part of your advocacy efforts can be very powerful, as some managers will listen more closely to people they know.   There may be special opportunities within labour unions to facilitate this.
  .   This approach would be necessarily limited where a company's traditional practice has been for major policy issues to be made by managers and directors with little perceived

need for broader input.

4. Presentation, Lobbying or face-to-face meetings.

.   Opportunities to present the 'human face' of the issue and to build a personal relationship are potentially valuable. Such opportunities may provide the best way for beneficiaries to explain their case directly (i.e. to tell their side of the story in personal terms.)
.   Organizers should be aware that such efforts can often take considerable time in a day's schedule and that managers may view themselves as being "too busy." Similarly it can be challenging to gain permission for presentation to Board of Directors as those agendas are often tightly controlled.

5. Interjecting Drama

.   Relaying of personal stories, or even performing music, poetry, etc., can be an effective communications tool. Such activity might be typically arranged in connection with an all-employee or labour union meeting. Emotional appeal works with some managers.
.   On the other side, some decision-makers might feel that emotional appeals are inherently unscientific and below their standing in the corporate world. "Drama is only for the illiterate". Some managers and directors might determine, in advance, that such presentations are not worth their time.

6. Issuing a Press release.

.   For organizations seeking public support, a formal press release can be a useful tool. Most reporting organizations have electronic tools that help them sort press release by topic and this can ensure that your release gets brought to the attention of the right people. Such release can be relatively quick to compile and are relatively cost effective.
.   Releases, of course, are only of value when public notice is desired. And it is critically important to be writing about something that would truly be viewed as "newsworthy." General press releases can be summarily disregarded and create a negative perception of the Society.

7. Conducting Media interviews

.   Organized media interviews, whether by phone or in person, carry many of the same benefits as a press release, above. They are especially useful when the issue needs a "human face" and when the Society has an individual particularly experienced in participating in such interviews. They are generally inexpensive to pursue, especially now with the availability of remote type technologies.
.   As again with press releases, it is important that a message of compelling interest is available. Media interviews can "backfire" if the individual is not completely prepared and/or if the journalists choose to present the material from a different or competing perspective. In such cases the Society would have little recourse, and may end up devoting considerable energy to counter an unflattering interview.

8. Organizing a Press conference

.   A press conference may, in some ways, be viewed as a combination of a press release and a media interview. They carry the same benefits and are especially useful if the

Society were, for example, to be announcing the launch of a major campaign. They are great opportunities to present "evidence" and to have that presentation widely reported. Such events are also good opportunities to showcase beneficiaries or allies and provide them with public recognition for their support.

.   In general, press conferences are difficult to organize and can be relatively expensive to conduct. The Society may be responsible for securing space, renting equipment, and for providing food and beverage.   As many press organizations have reduced staff, there is also a risk that few journalists would attend. In such an occurrence this may end up giving the impression that, regardless of content, the event was a failure.

Annex 2
Analysing a Law, Policy or Regulation
The first step in analysing and influencing a piece of legislation or policy is to understand what it is actually saying. A thorough understanding of "what is trying to be accomplished" is critical prior to initiating any of the particular advocacy methods described elsewhere in this document (e.g. setting up meetings, drafting of position papers, conducting media interviews).

Depending on the nature of a proposed new policy, the Society might undertake an initial review, but if the proposal deals with a highly technical issue, it may be necessary to assign the review to a special task-force, and/or to otherwise engage appropriate specialists from inside, or in some cases, from outside the Society.

Societies will need to be selective in which proposals it selects for "analysis" as this process can be time consuming and resource intensive.

Questions to ask when reading public policy or legislation.

The following list of questions may help the Society to analyse a policy or legislation, and to determine what role, if any the Society, might pursue:

- What is the primary purpose of the proposal? What problem(s) is it seeking address/fix.

- Does this proposal impact our Society and/or membership in an important way? Is pursuing it consistent with the Society's strategic plan and advocacy action agenda?

- Can we offer a special expertise in a way that is likely to make a difference? Do we have the time and resources to devote to this issue?

- How did this issue first come to the notice of decision-makers?

- Who benefits from this legislation or policy (if anyone)?

- Who is disadvantaged (if anyone)?

- Who supports this law/policy, and why?

- What are the costs (direct and indirect) and who will bear those costs?

- What will be the expectations five years from now of enforcing this? What are the consequences of not acting?

- Is the proposal practical? Are the appropriate systems/tools in place so that it might be implemented effectively?

- Can it be enforced? If so, by whom, and how?

- What is the penalty for non-compliance?

- Is this something public will be able to understand? Does the proposal contain a way to evaluate its impact and to make needed adjustments?

- Is the law/policy consistent with your own country's Bill of Rights and/or Constitution?

Annex 3   Developing an Effective Position Paper

A position paper is a formal, written record of the opinion of an organization with many potential uses. Development of position papers is an important part of the role of a Society, and should become more routine and efficient with time and experience.

Position paper format and style.
The position paper format below should be generally acceptable. On occasion, a target organization may specify preference for a particular format or style and that preference should be accommodated, whenever possible. Ideally a position paper should be provided on a Society's formal (letterhead) stationery, written in full sentences and in a style that would be found "readable" by a wide variety of audiences. These documents are often "left behind" and present a permanent record of your Society's positions, and demonstrate how effectively you are able to present them.

1. **Summary statement of main recommendation:** One to two sentences are generally sufficient.

2. **Background:** Explanation of why the position paper has been written. List of laws, international treaties, decrees, policies, etc., which support the recommendation.

3. **Evidence supporting the recommendations including:** Quantitative evidence (e.g. facts and figures); and qualitative evidence (e.g. case studies, personal testimonies, anecdotes and examples). Always make sure to provide citations and/or obtain needed permissions.

4. **Development of the Society's position:** Logical explanation of how the evidence leads to the recommendations. Anticipate questions and provide responses in a proactive manner.

5. **Recommendations:** Provide specific, realistic actions that the decision-maker can take now and in the future.

6. **A listing of other organizations and individuals supporting this position paper.**

7. **A contact name**, website URL, address, telephone, e-mail address, where available.

8. **A brief summary of your society (and/or coalition);** who you represent and your mission/goals.

Briefing notes
As opposed to formal position papers, "briefing note" documents are sometimes developed to be used by individuals within your organization, or within your advocacy alliance, to assist them in delivering advocacy messages. No external distribution is intended and may be expressly prohibited. Therefore, it is acceptable to write notes instead of full sentences, and to use bullet points. Follow the same format as above, but also:

- Emphasize the most important points – for example, using bold type/underline
- Suggest possible strategies, tactics and minimum demands that cannot be compromised.
- Include possible questions that might be asked, and suggested answers.
- Include problematic issues that might arise, and suggest how to deal with them.

- Make sure these briefing notes are kept "confidential" within the organization's designated presenters.

General advice

- Position Papers and Briefing Notes should be as short as possible. People are less likely to read them if they are too long.
- Do not assume that the reader knows the subject well – make sure that sufficient background information is included for the reader to understand the issue without needing to carry out additional research. Try to keep this information concise and seek to organize it in a way that will generally viewed as being helpful
- Separate fact from opinion. Provide supporting evidence to back up facts, and write opinions as quotes where appropriate.

Annex 4 Setting up and Conducting a Face-to-Face Meeting

Face-to-Face meetings for the purposes of recruiting potential allies, or making a case directly to decision-makers, is one of the most powerful tools available to OM societies. In pursuing this tactic, it is critical that such meeting be organized properly, be conducted at the right time in the advocacy effort, and that the OM society participants be fully prepared. The following are some basic steps that might be followed, again recognizing that each situation is different and steps may need to be modified accordingly.

Ask for a Meeting
Send an official letter from your Society explaining what your advocacy goal is and why you would like a meeting. Follow up with a phone call. Often you will not get a meeting with the 'direct target' but with one of their staff (an 'indirect target'). Always agree to meet with the staff, and treat them in the same way you would treat the decision-maker.

Prepare for the Meeting

Step 1: Know your target
Analyse your target. Understand what it is that they are trying to achieve and work to present your case in a constructive manner. Consider using the questions/table headings in the advocacy framework (need a reference back to main document.)

Step 2: Focus your message
Choose your main objective and develop a simple message the clearly expresses it:

- **What** you want to achieve
- **Why** you want to achieve it (the benefits of taking action, and/or the negative effects of doing nothing; evidence for the problem – statistics and anecdotes)
- **How** you propose to achieve it
- **What** action you want the target person to take.

Step 3: Choose the right messenger
Often the messenger is as important as the message. If a friend arranged the meeting, you might consider asking them to come to the meeting with you. Or someone directly affected by the issue or problem may be able to 'personalise' the issue and help get the decision-maker's attention. Make sure the messenger has the authority to speak on behalf of your Society, has appropriate negotiation skills and an attitude/style to result in a positive outcome.

Step 4: Prepare and Practice

- Send a briefing to the official you are going to be meeting with that explains what your organisation does, your concerns and what you want to address at the meeting. Be familiar with the issues you wish to discuss and what you have outlined in your request for a meeting.
- Rehearse your message with colleagues or friends. Ask someone to role-play the meeting, pretending to be the decision-maker, asking difficult and challenging questions.
- Arrive early and use this time to make contact with key bureaucrats in the official's office.

- Take written copies of your advocacy message and supporting documents and leave extra copies with officials. Leave behind your formal Position Paper, if you have developed on on the particular topic of concern.
- If possible go as a team of 2 but no more than 3, agree in advance who will present what, and in particular who will speak on behalf of the Society.

During The Meeting

- Take charge of the meeting and work to stay on the topic. You will have a limited time to present your case. Don't waste valuable time with "small talk."
- Be prepared to give background information, don't assume the official knows your issue in any substantial detail.
- Be clear and concise about asking the official for specific actions e.g. raising the issue in the legislature, making a public statement, talking to other official on your behalf.
- Encourage questions, try to engage them as much as possible. Try and find a personal connection.
- Don't go beyond your allotted time unless the official indicates they wish to.
- End the meeting by asking for a response by a certain date or setting some other parameters for a follow up discussion. You might, in addition, invite them out of their office to see the issue or problem first-hand and to show them why you need their support. While it is probably unlikely that they will accept your offer, the step of having done so may generate good faith and help create a lasting impression.

After The Meeting

- Write to the individual(s) who you met, thanking them for the meeting (even if the person was not helpful), briefly summarizing your key points and any supporting comments made by the target person, especially any promises to take action. Tell the target person what you plan to do next, promise to keep them informed, and express the hope that you will be able to work together on the issue in future. Keep the official informed of what is happening as appropriate, keep the link open.
- Document your encounter and debrief your colleagues. Discuss what went well, what could have been done better and what the next steps are.

Annex 5

Preparing and Distributing a Press Release

Distributing a Press Release can be an effective way to share your messages with the broad public. While some organizations may keep their own lists of outlets and distribute their releases directly, it is becoming more common in today's world that press releases are developed and submitted electronically through a "news wire service". Journalists who monitor these systems will have pre-selected "key words" that will direct the many thousands of daily release to their attention.

Whichever method is more prevalent in the OM Society's country, the key elements of writing a Press Release are the same. The most important point is that your Press Release must be considered to be "newsworthy". That is, is must contain a message that a journalist would find to be of interest and that would compel that journalist to take your message and fashion it into some type of news story for their news outlet or periodical.

An example of a newsworthy item might be where an OM Society has taken a formal position on a controversial or developing public policy issue. The public will be interested in knowing the scientific, evidence-based views of an important national medical specialty society, like Occupational Medicine. Again, a Press Release can be an effective way to share that information with the community. In general, notices of meetings or conferences, release of new products or services would NOT be considered to be newsworthy and should be communicated via vehicles other than a formal Press Release. Distributing Press Releases that are summarily ignored or determined to be not relevant can create a negative image of the Society that might make it increasingly difficult to command the future proper attentions of the print media.

Content

Work to capture the reader's attention by writing a simple and compelling headline. This will help the journalist understand the story immediately. The first few sentences of the Press Release should summarise the most important facts:

- **Who** is involved?

- **What** is happening?

- **Where** is it happening?

- **When** is it happening?

- **Why** is this happening?

The main part of the press release should then explain these points in further detail. This information helps to persuade the journalist of the facts and importance of the subject, and why it is of interest.

Quotes can often make a press release more interesting and appealing to the journalist, because they may not have access to the relevant people. Direct speech quotations from people involved in the issue or activity:

- should express an opinion, fact, or be able to support the view you have expressed in your press release

- allow you to give strong opinions that would look wrong in ordinary text; and

- give a human dimension to the story,

Usually a quote from the Society's President or other designated leader would be appropriate. Other individuals might also be quoted, as they support your arguments, but make sure you gain appropriate permissions.

Style

- Short sentences, maximum 20 words.
- Short paragraphs, maximum two to three sentences.
- Mimic the format and story structure from a typical, well read, newspaper article.
- Use a good case study or anecdote as evidence to support your point of view.

Presentation

- Use official Society letterhead.
- Make sure that it is well laid out and easy to read.
- Provide "links" to information on your website that might provide additional information for the reader.
- Provide a bit of background about your Society.
- Provide a contact name, telephone and fax number, and e-mail address as available.
- Give an embargo time (the day/time when the journalists are allowed to use the information).

Photographs

- Include photographs of key people or places mentioned in the press release if they are particularly relevant to the points you are making. Visuals can often boost the power of your written words.

Annex 6 How to carry out a media interview

Preparing for the interview
Find out the answers to the following kinds of questions before any interview:

- Where and when will the interview take place?
- How long will the interview be?
- Who else, if anyone, is being interviewed?
- Will the discussion or interview follow a film or be linked to another story?
- Why have they chosen the subject to address and selected you for the interview?
- Will the interview be broadcast live?

Find out about the journalist who will be interviewing you and:

- Investigate their audience – who are the targets amongst their audience and what kind of information do you need to get across?
- Contact them and agree the subject to be discussed. Remember that the interview starts as soon as you begin talking to a journalist. There is no such thing as 'off the record'. Define the issues clearly. Ask the journalist what kind of questions they will ask and whether they will be supportive or argumentative. Prepare appropriate information beforehand – for example, statistics, facts, a personal story, etc.
- Make a list of key messages you want to get across with three or four key points for each.
- Prepare catchy sentences ('sound-bites') that summarise your message.
- Check that you have up-to-date information on your issue.
- Work closely with your colleagues to develop a draft list of possible questions. Prepare answers to these and practise developing responses to them.

What to do during the interview

- Try and keep calm and composed.
- Remember that the journalist is not your advocacy target – the target will either be influential people listening or watching or the general public as indirect targets.
- Remember that you have the facts you need and that you know more than the journalist does about your area. Keep your answers concise and short, using simple language, without jargon or acronyms. Do not get side-tracked – keep to your key points. If a question strays from your topic, try to move back to the area you want to talk about – for example, "I think what you are asking about is important but the main issue is..."
- If you need time to think about a response, repeat the question before responding.
- Always bring the journalist back to your key messages/points, repetition is a way of getting your message across.

Differences between media

Press interviews tend to be more relaxed than radio or TV interviews. If you make a mistake, say so and answer again.

Radio interviews: In a studio, the studio manager will give you specific instructions about where to sit, how to use the microphone, etc. Sometimes this is done with little time to spare. However, take your time and be sure you understand the instructions. Ask what the first question will be to help you concentrate. You can take notes with you – but try not to rustle the pages. (Brief notes on postcards are often more helpful.) If you make a mistake during a

recorded interview, you can ask to try the answer again. If it is live you can say, "Perhaps I might explain that answer", and continue.

TV interviews: The same rules apply as for the radio interview but you can be seen! TV interviews are usually shorter than radio interviews. The interview may be pre-recorded or live.