**Day 2**

1. **The Importance of Thinking and Acting Strategically During Tough Times**

Bob Greenstein, President and Executive Director, CBPP

* Budget resolution in March
	+ House--Ryan budget 2/3 of cuts from programs for low income people
	+ Senate--probably will look similar
		- won't touch social security, defense, Medicaid for current beneficiaries
* not a law but framework that guides subsequent laws
* will include guidance for budget reconciliation bill
	+ GOP plans to pass over April, May June
	+ will not have same level of cuts as resolution
		- cuts to Medicaid, SSI for kids, SNAP
	+ will be vetoed
* White House priority, deal to ease sequestration
	+ with absence of deal total sequestration in 2016 total funding for budget other than defense will fall to lowest level since Dwight Eisenhower
	+ negotiations from GOP will be policy changes in healthcare, environment, cuts in entitlements
	+ sequestration bad but when you lose the fundamental structure of a low income entitlement you don’t get it back
* Supreme court king decision
	+ subsidies in states
	+ if pulled into negotiations democrats may not be able to walk away
* other negotiations include limit to federal matching of Medicaid to per capita funding
	+ work requirement for Medicaid participants
* urgent need for alliances with health insurance and low income advocates to rally together to shift to state exchanges
* republicans control 69 of 99 legislative chambers
* ALEC summit, how states can shrink the welfare state
	+ state based solutions to welfare to work to change lives and reduce costs
	+ stated as fact, once a family begins to receive government assistance they stop working and become politically aligned with liberals
	+ "welfare transforms how an adult lives and interacts in an election circuit"
	+ job of legislators to free individuals from shackles of welfare trap
	+ will propose legislation to end waivers for ABAWDS, move applications online,
	+ end categorical eligibility for snap for near poor working families, asset limits, re-imposing market value
	+ the theme isn't about work, but rather shrinking the caseload
	+ with AFDC for every 100 families with kids in poverty 66 received assistance, currently with TANF 25
	+ want to repeat for other programs
* preventing working poor and near poor from getting assistance
* other ridiculousness, 5 year time limit on EITC<--hypocrisy and tension
* when families get assistance kids do better in school and adulthood
* working with appropriate allies in states
* improvements at admin level with how welfare programs work

**Q&A**

**Julie Kersick**: do you see much on EITC for childless adults? Congressman Ryan agrees but how to pay for it

**Bob**: largely corporate tax cuts proposed to make permanent instead of annual. Proposed in exchange for permanent corporate side permanent credit improvements for low-income. Wanted to bar undocumented immigrants from receiving EITC for 5-7 after exec order. Solidified as higher priority, but now GOP more hostile to EITC.

Ryan has been generally endorsing EITC and increase in childless credit, but shouldn’t add to overall cost. Gave interview that improvements enacted in 09 were always meant to be temp and should expire. And EITC should be reworked. Cut elsewhere within EITC to pay for expansion for childless work.

Best chance for childless workers in tax reform. Chance of tax reform rather than corporate only tax reform low. Best chance to link credits to corporate reform

Battles will probably last thru 2017 when current provisions expire

Make permanent and expand to childless workers without cuts to current program

1. **Talking Strategy: Tools for Mounting Effective Issue Campaigns**

Louisa Warren, Senior Policy Advisor CBPP

* Framework for mounting issue campaigns
* may need to take more aggressive tactics
	+ e.g. call for elected officials and those who get mortgage rate deductions to get drug tested
* strategically taking down your opponents
* **Strategic Planning**
	+ strategic assumptions
	+ objectives/goals
	+ audience (Universe and targets)
	+ message/narrative
	+ strategy
	+ tactics
	+ timelines/calendar
	+ budget
* often jump right to tactics
	+ this happened we need to have a press conference
* budget ideal but need to have internal conversations
* Strategic assumptions: internal and external contexts
	+ what is the political make up and their opinions
	+ what are allies position
	+ other key issues going on
	+ media
* **Goals, Strategies and Tactics**
	+ goal: working thru 2017 to strengthen EITC
	+ objectives: cultivating new allies, shaping new language, etc.
* objectives reflect overall theory of change
* **Jessica Bartholow**: if it's not working consider a different frame
* **Bich Ha Pham**: realties between ideal strategies and what you have access to
* **Louisa**: matching targets, how they get their information, resources and capacity available
* **Powermapping=targeting**
	+ thinking about who holds the power
	+ how do we get to the influencers
	+ talking to the harder people
		- am I the best person/is my organization the best to deliver this message to this person
* determine strategic assumptions
* determine the targets/influencers
* map the relational lines
* target priority relationships
* connect to you campaign/strategy
* Not exclusively for elected officials
* does your campaign strategy connect to your targets
* primary targets=decision makers but secondary targets=people who can get to primary targets
* **Cultivating Strategic Partnerships**
	+ key how they are engages
	+ focusing on environment and strategy of how to build and sustain
	+ give-get ratio
		- what am I giving and what am I getting?
		- what is the other party giving and getting?
		- open conversation with partners about what they can get and what they should give
	+ 3ps of effective partnerships
		- people--are the right people at the table
			* are you spending enough people time. effective people relationship
		- purpose--is there a clear purpose that is understood by all of the partners
		- process--do we have the right process for what we're trying to achieve given the people at the table and the purpose we have. form should follow function
* often out of alignment

Q&A
**Rachel Post**: group of organizations spread too thin and don’t have capacity to fully invest in a coalition

**Louisa**: somebody has to call that out. Define what needs to be accomplished and who's going to carry it forward

**Julie Kerksick**: how do you staff? Do you have capacity to staff a coalition? Difference between spinning wheels and moving forward. Clearly defined role who is staffing, not the boss but base

**Bich Ha**: funding is difficult to find, but is there a way to find pool of funding for power planning with groups in the room. e.g. webinars on powermapping in diff cities or states. Small grants to service providers have been proven useful.

**Jessica Bartholow**: leader not necessarily the facilitator or staffer. Empower people to take on roles even if they aren't leaders or leading organizations. Legislative buy in to get coalition partners to stay at the table

**Don Friedman**: how to reinvigorate coalition that's become stale? Recognize that sometimes you have to bring people to the table so they don't feel alienated
**Chaer Robert**: defense work, shared threat
**David Gray**: identifying small wins. Speaking with key influencers after losses to keep momentum going even if they don’t seem impactful in the larger scheme

**Louisa:** leap & creep. Leaping and creeping times in policy change. Sometimes too attached to a coalition form, may need to ebb and flow. Coalitions live and die, loose sustained phase vs. energized phase

1. **Putting Strategy Into Practice: Examples from the Field**

Moderator: Cemeré James, CLASP

Panelists:

Jessie Hogg Leslie, National Skills Coalition

Alice Pritchard, CT Women’s Education and Legal Fund

Ed Bolen, CBPP

Jessie Hogg Leslie, National Skills Coalition

* Policy organization for federal and state policy based in DC. broad based coalition
* broad range of stakeholders
	+ skilling up workers or hiring skilled workers
* policy asks based on what is coming from the field
* looking for opportunities to get language in around workforce development and skills development
* what will make the system better, not just individual interest
* bringing together broad spectrum of stakeholders creates policy recommendations that can serve broad range of needs
* workforce development/economic development bipartisan issue, solutions may look different
	+ allows you to bring other people to the table
* working to shape what platform looks like
* WIOA passed on bipartisan bicameral basis
	+ bring down to state level
	+ have to come up with a plan
* has a lot of signaling language but not detail

Alice Pritchard, CT Women’s Education and Legal Fund

* how CT was inspired to start a coalition
* Shift from the beginning of talking about strategies not populations.
	+ strategy not the recipient of the resource, welfare recipient, ex-offenders, low-skilled
	+ everyone could see their program could be help but chamber didn’t see a welfare program
	+ makes it difficult to keep people engaged
* legislative strategy
	+ considered unlikely committees
	+ commerce, labor, shop around to different committees, tailored speakers to committee
* Challenge: pitting people against workforce system. Assume it's not going to help through creaming. Focus on what everybody needs not just small pockets

Ed Bolen, CBPP

* Defense for ABAWDS (nondisabled childless adults), 3month time limit unless in work program
* SNAP 3 month time limit returns in force cy2016
* estimate that roughly 1million individuals will lose SNAP in 2016
	+ receive about $150 to 200per month in benefits
* 70% of the country lives in waived area in fy15 for high unemployment
* but only 20% of the population will live in waived area in 2016
* Educational strategy, are people aware
* rhetoric that these people should be working, requires good defense
* 40% women
* finding out who is serving those populations, recognize that they are relying on snap
	+ food pantries, homeless shelters
	+ people are paying rent now because they have food, but may not if don't receive
* no guarantee that state has to provide job training
* not a work requirement, but rather time limit
	+ no requirement for state to provide
* Suggestions: are waivers available, statewide or for areas
* able bodied doesn’t mean ready to take a job
	+ exemptions from medical professionals, is state enforcing
* if state does offer program opportunity for additional federal funding

**Alice**: honesty that capacity is not there to deliver on mandated programs, in community colleges, etc.

Industries structured for slow entry. Ways to loosen rules

**Ed**: SNAP E&T Pilots recognize that work is a work training activity

If in a program qualify for cost to participate, typically transportation and child care

**Jessica Bartholow**: difference in support for work from E&T and Pilot?

**Ed**: Pilots added to structure of E&T. E&T only 3 months

**Kate Coventry**: DC found delays beneficial because you can't cut services if you don't provide good services. High quality for people who can benefit and something cheap to help everybody else

**Ed**: States have options to offer exemptions

**Peter Ruark**: where do you go to find out what state or county will be eligible for waivers?

**Ed**: ask CBPP

**Wendy Patton**: encourage admin to apply for waivers for specific areas?

**Ed**: yes, could

**Donna**: How will the planning work? How will coalition be a part of? What if not a coalition in the state?

**Jessie**: Guidelines out Jan 2015. Plans have to be submitted by 2016. Town hall meetings by fed. Most action will be at state level. Governor’s workforce boards will have large role. Recommendations from NSJC

**Elziabeth**: how to get human services agencies engaged?

**Jessie**: some options in nature of consolidated plan would encourage agency engagement.

**Alice**: leverage relationships with workforce boards at local level

**Melissa Young**: TANF and Second chance act are mandated partners. Intersection between workforce, TANF, and criminal justice

**Donna**: concern that WIOA will take TANF funds but not serve recipients

**Jessie**: creating agreed upon plan and process among those that come to the table of how we're going to make it work. If opportunities to change framework are not taken advantage of won't change outcomes

**Melissa Young**: Boards have to identify how they are going to serve individuals with barriers to employment and identify best and promising practices. Opportunity for advocates to influence how and what

**Cemere**: what you're excited about

**Ed**: there are options for states. Draw a line that nobody loses benefits take waivers, exemptions, take the pledge for E&T programs

**Alice**: nice that there is attention to adult's needs

**Jessie**: Advocacy Summit Feb 8-10

1. **Getting the Message Right**

Moderator: Melissa Boteach, Center for American Progress

Panelists:

Jessica Bartholow, Western Center on Law and Poverty

Jeanette Mott Oxford, Empower Missouri

Christine Hastedt, Maine Equal Justice Partners

In order to get to the “leap” period, need to lay the groundwork now.

* Don’t argue on conservative terms
* Use defensive battles/proactive opportunities to push messaging framework

Session will explore the messaging framework, which seeks to push back on harmful policies while shift to proactive discussion about work. **Sponsor groups strongly invite feedback on framework.**

When we only play defense:

* Risk ceding arguments about welfare dependency, safety net as hammock
* Need to rebut arguments as necessary but must also use opportunities to pivot to what we want to talk about
* Defense isn’t effective when it lets others define impact of our policies or lets wrong policy visions gain traction (i.e. rave reviews about welfare reform)

3 Reasons to Pivot

1. Middle class interests are converging. Half in Ten polling found that people recognize structural issues that drive poverty. We can insert our goals into broader debate on mobility for constructive conversation.
	1. Maine polling supports findings at the state level.
2. Policymakers are talking about it. Conservatives have been given millions to build up policy proposals. Rubio/Ryan proposals will drive the conversation if we don’t engage.
3. Public is ready for change. More Americans are still on the brink. People fundamentally understand that it’s the economy not personal responsibility that is responsible for poverty.
4. Strong support for government to fight poverty. Half in Ten found majority support even after saying that taxes might need to be raised/new regulations created.
5. Strong support for jobs/education/wages/affordable housing

**Details on the Messaging Framework (Melissa Boteach will circulate)**

* Not top down set of talking points. Need to be informed by advocate experiences
* Utilizes implicit myth busting of dependency myths/false ideas that War on Poverty failed
* 3 pillars
	+ People who work for a living ought to have a decent life
		- Too many jobs today deliberately deprive people of hours/wages or refuse to pay wages.
		- Denying people salaries and telling them to work harder doesn’t work.
		- Cutting taxes doesn’t work – it deprives people of skills and harms economy.
	+ In America, every family should have good housing, nutrition, education, healthcare, and a secure retirement.
		- Better to pull out threads as opposed to say safety net – people don’t know what the safety net is.
		- Align policies in line with 21st century realities and do no harm.
		- CAP has been successful with Mark Rank data – 4 in 5 Americans will experience 1 year of economic insecurity. The safety net is social insurance for all of us.
		- Conservatives (language depends on context) have it backwards – the safety net doesn’t force people into poverty. Losing a house does etc.
	+ Don’t trap people in
	+ Poverty that often lasts or gets worse over generations. Remove barriers to opportunity.
		- People miss/overlook artificial barriers that keep people stuck in poverty
		- Even in a full employment economy, people are still getting left behind because of mental health issues/criminal records etc.

CAP Resources: communications training, technical assistance, data tools/resources, Talkpoverty.org, Our American Story network

* + Stories are good for budget cuts, putting face on poverty, and for pushing reforms etc.

**Panelist questions – How have you won or effectively lost? Did you pivot?**

**Jessica Bartholow:**

* Need to dismantle both policies and the thinking behind the policies. Problematic policies include family cap and school attendance policies & sanctions.

School attendance/sanctioning policy

* School attendance established by Eloise Anderson, now Scott Walker’s HHS Secretary.
* CA policy depended on how district defined attendance.
* Families were finding it hard to get to school because transportation systems were dismantled. Not getting to school = symptom of deep poverty, but families were getting sanctions.
* Initially, advocates made the argument that this policy was a “double penalty” and that the policy wasn’t fair for kids.
	+ Didn’t work. State legislators didn’t buy the ‘double penalty’ argument and thought advocates were dishonest.
	+ Framing shifts to idea that sanction made it more difficult to go to school, and that the policy encourages truancy. This played on legislature support for school intendance.
		- Message: We need to be doing everything we can to keep kids in school and poverty/homelessness drive lack of school attendance. Sanctions make the problem worse, so don’t sanction.
			* Strong bipartisan support with this messaging.

**Christine Hastedt**

* Gov. LePage proposed a welfare “reform” package that confirmed stereotypes of rampant fraud and operated on principle of a lack of effort.
* Advocates found a piece of the package that allowed them to flip narrative. When deciding who to target, they asked the following questions:
* Whose support can we get? Who was persuadable? Who would never vote for us? They messaged to the 2 possible groups and wrote off the others.
	+ Some legislators are not interested in improving the system but want to demonize the poor for political gain. Write them off.
* Strategy
	+ Need to start by discrediting proposals i.e. proposals are unnecessary, aren’t going to achieve the goal, and by the way collateral damage is children.
		- And by the way, some of these just aren’t legal, error of fact.
		- Used very measured approach with a lot of factsheets.
	+ Advocates found a popular program on the chopping block and used it to rally support.
		- Parents & Scholars program is bipartisan. It helps parents on TANF go to postsecondary school.
			* Used storytellers to highlight importance of program, which was extremely effective and got a lot of editorial board buy-in.
		- Defeated the rest of the proposals by dividing supporters of the proposal – push moderates away from ideologues.

**Jeanette Mott Oxford**

* Missouri eliminated the SNAP felony drug ban.
* Legislature has a lot of members from radical religious right, used faith-language (human redemption, don’t put barriers in their way, don’t make people fail). Sentencing Project recruited conservative faith group to write editorial. Also had food pantry representatives saying rule hurts their ability to do their job.
	+ Also used stories that would appeal to religious conservatives.
		- One woman with a criminal record was pregnant and would go blind if she had a child and she chose to go blind.
		- Another man with a criminal record was a business owner whose son was sick and he had to care for him.

**What would be helpful for state-level advocates to push individual narratives at local/state level?**

**Jessica Bartholow:**

* *Los Angeles Times* wrote the story about people using withdrawals for strip clubs/casinos.
* Tips:
	+ Know that the story will go viral.
	+ Develop not only data but messaging talking points. If pivoting, it needs to be within the same confine i.e. did you know that $20 million of assistance is going to fees/surcharges?
	+ We need to stop abuse/fraud. Did you know we had a client who was ripped off about electronic thieves?
	+ Offense is best defense.

**How do you address race/ethnicity in messaging?**

**Jeanette Mott Oxford**

* Language around welfare is coded racial language.
* Best way to break prejudice is to make repeated, positive interactions to have cognitive dissonance.
* Some people bring out data about white people, which can be ineffective because it sounds like people should only care because white people are poor too.
* Need to make sure low-income people who are testifying to their experience are prepared for nasty stuff. One way to do this is to give people support systems so people aren’t worn out and support them with allies.

**Jessica Bartholow**

* Have to be intentional about advocacy -- Western Center/Shriver Center are running a racial justice/equity group.

**Moving into 2016 – what are your plans for next 2 years? Are there any challenges or opportunities coming? How can you be a model for other states?**

**Christine Hastedt**

* New challenge is how to use people’s belief that the economy isn’t working for everyone.
	+ MEJP had an academic institution do polling to boost credibility and polled low-income people.
		- Found that everyone believes in jobs/wages/healthcare/working conditions/education.
		- Followed up with community conversations, and MEJP asked poll participants to come and talk about solutions.
			* MEJC is going to bring people to statehouse/train them. They will also push several pieces of legislation that rest on economic findings of report.

**Audience questions/comments**

* EITC is a cause conservatives can support. Michigan advocates found that high error rate with EITC is partially driven by commercial tax preparers.
	+ There are no requirements for training for tax preparers as opposed to VITA sites which are IRS trained.
		- VITA sites are most highly qualified to be preparing taxes for low-income adults.
	+ We can promote VITA sites or require stricter refund anticipation loan requirements, along with limits on interest rates and fees.

**How can we, as a community, use some of the social messaging as part of an offensive measure? How can ground be laid now to further offense?**

* Recent election, minimum wage went 5 for 5. There is public support for the policies. Advocates can focus on intersection points.
* Use social media. If you have white privilege, you have a duty to education family/friends/neighbors. A lot of white people are unaware that disparities exist.
	+ Kirwin Institute has data at the county level around racial/ethnic lines.
	+ Opportunity Agenda also has messaging around the data.
1. **What Are Next Steps/What Do Advocates Need**
* State/local advocates can coordinate with national groups. One example is CBPP helping out with exposing Gov. LePage. Be position to take the advantage to push back/forward,
* Subscription to federal funding information for states. Information on fiscal source from NGA/NCSL to get subscription information.

* Would be helpful to have materials on TANF/workforce overlap. CBPP could think about putting together more internal content.
* Need feedback on draft document that was circulated.
* Need help actually using the messaging. Being able to implement it/use it is the problem. CAP JPB mobilization curriculum hopes to have a training module/field input.
* CLASP has done a lot on TANF education & training. It would be great to get that updated along with some ideas of what other states are doing.
* More information about where sponsor groups break down the silos. Would be great to see more materials about opportunities for helping people using non-traditional avenues.
* Good to circulate beneficial statements from unlikely partners if their national group is saying something that supports our policies.
* Have a TalkPoverty week on work and opportunity where people can write their ideas on the subject and break down silos.
* Determine if there are differences in values and find commonality.
* How are people finding these people to testify?
	+ Legal services community can help
	+ Our American Story network
	+ Witnesses to Hunger
	+ Survey work is also helpful
	+ LSU uses social work class students to help
* Providing more archives of past content
* Provide notes from the past two days and open them up to comments and suggestions. Possible monthly webinars to build on conversations from meetings?
* Make sure National Skills Coalition is involved in conversation
* Add work section to TANF listserv