

WORKSHEET:

Recording Events



As you advocate for yourself, you will probably need to tell and re-tell the story about the situation which made you decide to advocate for yourself. The people you deal with while trying to resolve your situation will appreciate you being as brief and consistent as possible.

The questions below are intended to help you be clear about what happened, when it happened, and whom you are dealing with now about the situation.

What happened?

Where did the incident occur?

When did it happen?

What were the reasons the people I was dealing with did not give me what I asked for?

What are the names of the people I talked to at the agency, or agencies, to try and resolve this situation?

How did this infringe on my rights?

WORKSHEET:

How Has This Situation Affected Me?



Your situation probably isn't simple; it rarely is. It could be that there are a lot of smaller issues that can be resolved over time, or there might be one bigger issue that needs to be looked at right now. Sometimes two or three issues can be resolved at the same time. You are the only person who knows everything that is going on in your life right now.

Try making a list of what you need. The questions below are meant to help you get started:

What difficulties has this situation caused me?

What is the most important issue for me to deal with right now?

What will happen if this issue doesn't get resolved right away? Maybe nothing will happen – maybe a whole lot will happen.

Ask yourself

- Am I concentrating on my most pressing concern?
- Will someone else understand what I am talking about?
- Can I keep it brief?
- Can I work on this concern in a positive manner and keep my anger and frustration in check to achieve my goal?

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SELF-ADVOCACY

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This Tipsheet was compiled using the following resources:

May, Pat. "The Advokit: A Self-Help Guide on how to Advocate for yourself." Penticton Advocacy Network, 1996. As cited by Domestic Abuse Must Stop, 2004. www.domesticabusemuststop.org

Keeping Records



It's extremely important to keep records as you go along. Take as many notes as you can about:

- Who you talked to
- When you talked to them
- What was said
- What action they said they would take
- When and how they will let you know that the action has been, taken
- What action you said you would take
- Whether you need to call them back

It's important to take notes as you work through the steps of advocating for yourself.

If you would rather not do a lot of writing, you could ask someone to write it down for you.

You might want to consider taking someone with you when you meet with officials, financial aid workers, etc. They could help by:

- Keeping notes
- Providing moral support
- Serving as a witness for you

You could end up collecting a lot of information. **It's important to keep copies of everything, such as:**

- Your notes
- Letters people send you
- Copies of letters you send to people
- Copies of policies and procedures

Be sure to keep copies in a safe place that is easily accessible. You can ask your local ASO to make copies for you, and to keep a copy in your file. That way if you lose any of them, if they're destroyed in a flood or fire, if you end up in the hospital or if you go to jail, you know that there is a copy with someone you trust.

If you have gone to more than one service provider, it is a good idea to make the service provider aware that the other was contacted, to limit the repeat calls, and to make your advocacy time more efficient.

If someone at an agency wants copies of the information you have collected, and if you want to give it to them, ask them to make copies in their office. That way you won't have to pay for the photocopying.

TIP SHEET:

Communication Skills



No matter how you choose to advocate on your own behalf, it will involve communicating with a person or agency – by phone, by letter or in person. The most important tool you have for self-advocacy is yourself.

The ability to say what you want, and listen to what other people are saying will increase your chances of getting what you want. The only way that others are going to know about your feelings, concerns, experiences and challenges, is for you to tell them.

The best reason to be your own advocate is that no one knows as much about you and what you think, feel, need and want as you do. Speaking up is a big step towards self-respect, dignity and reclaiming your rights. You will know that you took care of yourself, even if you do not get what you want.

Take responsibility for your own feelings:

You have the right to be safe from physical and verbal abuse and so does the person you are talking to. When speaking with your income support worker, it helps to remain calm and patient. This way you can communicate effectively with them and you do not make the person you are talking to feel uncomfortable. Try taking a friend with you to appointments who can help you stay calm and who can give you support when you are feeling angry or upset.

Be assertive, not aggressive:

You are using assertive communication skills when you:

- Use a 'reasonable' tone of voice/attitude
- Are brief, clear and consistent
- Ask for explanations until you understand what is being said
- Listen to what the other person has to say and repeat it back to them to show that you understand. You don't have to agree, but try to understand that they have a different point of view
- Make sure everyone at a meeting understands what you want

Give credit where credit is due:

Sometimes agency workers are helpful or work hard on your behalf even though, in the end, they don't get you what you want. There could be difficulties you don't know about, such as laws or rigid policies. Let these people know you appreciate their efforts whether you get what you want or not.

WORKSHEET:

Getting an Appointment



The following information may help in getting organized for your appointment at the agency where you are going to advocate for yourself.

Name of Person I Need to See:

Title:

Day and Time of Appointment:

Address:

Information about accessibility, bus stops, parking:

Documents I need to take with me:

- Social Insurance Number
- Photo i.d.
- Receipts
- Birth Certificates
- Immigration papers
- Letters from doctors or other professionals
- Other documents this agency requires _____
- My notes and other information I have collected about my situation

There are some additional points you may want to consider as you prepare to advocate for yourself in person:

- Am I clear about what happened, what I want to do about it, what policies and laws apply to my situation, what my rights and responsibilities are?
- Do I want to take someone with me - for support, to help me stay calm, as an interpreter, as a witness? Who?
- Could that person take notes of the meeting for me?
- Anything else that I can think of?

Once you are face-to face with the person you are advocating with, talk about your situation as clearly and concisely as possible.

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SELF-ADVOCACY

TIP SHEET:

Writing a Letter



You might want to follow these guidelines for writing a self-advocacy letter:

- Keep it short (not more than one or two pages)
- Be courteous
- Make sure your letter is readable (if your writing isn't clear, try using a community centre computer)
- Write about only one issue per letter
- If you have access to the technology, try sending your letter by fax or e-mail (e-mail yourself a copy too)
- Make sure you keep a copy for yourself

Here are some suggestions about what to include in a self-advocacy letter.

- Date
- Your address, including postal code
- Name of person you are writing to
- Name of agency/government department address, including postal code
- Salutation. Dear _____
- A statement of what you want from the person you are writing to
- A brief description of the situation
- The names of people you have already contacted to try and resolve the situation
- A closing statement
- Your name
- A telephone number where you can be reached or where a message can be left

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Advocacy in Action! Getting Problems Solved

January 3, 1996

1234 High Street
Penticton, B.C.V2A 2H0

Helen R. Supervisor
Ministry of Bureaucracy
Parliament Buildings Victoria, B.C.
V2R 4X8

Dear Ms. Supervisor:

Your office says I did not send proper receipts in order to get reimbursed for some health expenses. I would like you to help me get this sorted out.

Here is what happened. On November 30, 1995 I called the Penticton office and spoke to Chris who said that all I needed was to send in Form A. I sent in Form A, plus some receipts I got a phone call from Jody in your office on December 7 saying that I also needed Form B.

I went to the Penticton office and picked up Form B and sent it in. I got a letter back from your office saying that I had never sent in Form A. I called your office on December 20 and talked to Kim to say that I had already sent in Form A along with the receipts your office needed. Kim said that they had never been received either Form A or the receipts. I told Kim that your office must have received them since I got a phone call saying that I needed to send in another form. Kim insisted that the Form A had never been received.

I didn't keep a copy of the receipts that I sent with Form A. Your office has lost them along with the original form. Would you please look into this and call me at 490-000 by January 12 to let me know when I will be reimbursed for my health expenses.

I am feeling very frustrated by this situation and I would appreciate your help to get it resolved.

Yours sincerely,

Sandy Smith.

WORKSHEET:

Record of Personal or Telephone Contact



It's helpful to keep track of whom you spoke to, and what you discussed. This worksheet can help you keep track of your phone calls and face-to-face meetings.

Date:

Name:

Position:

What was I told?

Are there any deadlines?

What do I need to do to follow up?

Do I need to get any documents?

Am I supposed to fax them, mail them, or deliver them in person?

Do I need to pre-plan this step?

Is there anyone who can help me do this?

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WORKSHEET:

Helpful Organizations



Individuals, organizations or groups that might have some helpful suggestions for me are:

Name:

Phone No.:

Name:

Phone No.:

Name:

Phone No.:

The agencies and individuals you listed previously are good sources of information on how to:

- Be better informed about what your rights and responsibilities really are
- Get an idea of your chances of getting what you want
- Be prepared when you contact an agency where you will be advocating for yourself

Some questions people need to answer in order to self-advocate are:

- What do laws or policies say about my rights in this situation? Where can I find that information?
- What have other people in similar situations done? Were they successful in getting what they wanted?
- Who else in the community deals with this kind of situation? Is there someone in particular I could talk to?
- Based on the information I have collected, what do I want to happen in my situation?

This is a good time to pick up the phone and call the agencies that can help you self-advocate.

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WORKSHEET:

Self-Advocacy by phone



Before you go in person to the agency where you are experiencing difficulties, it might save you time if you find out whether this situation can be resolved with a phone call. If you decide to phone, be sure and make a note of when you called, whom you talked to, and what they said.

Ask yourself:

Do I know what I want to say about:

- What happened?
- What I want to do about it?
- What my rights and responsibilities are?
- What laws and policies apply to my situation?
- Do you need to have a file number, client or other i.d. handy in case you are asked?

The person who answers the phone may not be the person who can help you with this situation. Try asking the following questions:

Who is the person with the power to make a decision about my situation?

Name:

Title:

Can I talk to them on the phone or do I need to make an appointment?

Phone:

Appointment (day and time):

If the person I need to talk to is not there, when is a good time for me to call them back?

Time:

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When a Decision Doesn't Go Your Way



What If I Don't Get What I Want?

You have just been through a very thorough self-advocacy process. Congratulations on your hard work and persistence. However, you still may not have been able to get what you wanted. This page suggests a few options that you can consider.

- Make an appeal
- Contact a supervisor or someone higher up who can make decisions
- Give up on this issue and start again with another issue that is important to you
- Support a group that is advocating for changes in laws, policies and regulations

Appealing a Decision

If you are not satisfied with the results you get when you advocate for yourself, you need to ask if there is an appeal process.

If there is a formal appeal process, ask:

Are there appeal forms?

Where can I get them?

Do I have to appeal within a certain period of time? What is it?

If there is no formal appeal process, ask for:

The name of a supervisor you call contact about this situation, or a government department that handles complaints about that agency.

Name:

Phone Number:

Address:

Letting It Go

You have put a lot of work into this. You may feel that it is just too much effort to keep going on this issue. You could go back to your list of issues and choose another one to work on. The next time it won't take as much work - you already know how to advocate for yourself.

Support and Advocacy Groups

Sometimes it doesn't matter how hard you work, you just can't get past the law or policy that is keeping you from getting what you want. Other people are probably experiencing the same difficulties. Join with them to work for change.

WORKSHEET:

How Can I Get This Situation Resolved?



By now you are probably clear about what happened and have decided what issue you want to deal with first. This page is to help you find out what kinds of choices you have. There is often more than one way to solve a problem. You may already have some good ideas about what to do next.

What ideas do I have on how to resolve this situation?

What got in the way when I tried to use these ideas to resolve this situation?

How have other people handled similar situations?

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Build or Join a Campaign



Campaigns are extremely important to advocacy and require a combination of many different strategies and players in order to be effective. The **most effective campaigns are grounded in existing advocacy efforts and use well thought out strategies for specific end goals.** Starting or joining a national or global campaign can be a very strategic and direct way to influence the inequalities PLWHIV/AIDS face throughout the world, especially if the campaign is directly challenging a specific law or policy.

Campaigns are most strategic when a particular issue is at the forefront of concern and a strategy is needed in order to make specific gains. Campaigns can fulfill numerous purposes within broader advocacy goals of policy change.

Here are some examples of what advocacy campaigns can do:

- **raise awareness** for mobilization on an issue
- **attract media attention** to an issue
- **pressure the government** during negotiations
- **ensure that a policy is being implemented** correctly and in a timely manner.

To ensure that you make strategic decisions when designing or joining a campaign, ask yourself:

- Why am I joining/creating this campaign? What outcomes am I hoping to achieve?
- Who/what is this campaign supporting?
- Who is supporting the campaign and why?
- Is this campaign supported at different levels and grounded in daily struggles which could be improved by successfully achieving the campaign's goal?
- Is this campaign harnessing a strategic moment or a particular political venue that is appropriate to the issue?
- Will the campaign raise awareness of people and encourage citizen participation in decision-making?
- Will the campaign contribute to the transformation of power relations?

Identify your Target Audience

In building a campaign, it is important to **identify your target audiences**. For example, if you are targeting a broad audience of the general public with your communication and alliance building strategies, it is important to frame your messages in a way that is meaningful to those without specific knowledge of the issue. This is in contrast to targeting policy-makers who support your endeavour or those who are opposed to the changes that you are advocating for.

Create your Message

Messages should be distilled from your statement of position. These are the ideas that you want to leave with the group or individuals you have met or contacted. For maximum effect, your organization's messages should be:

- **Brief.** Three (or fewer) simple messages are all people can retain. You should be able to state your case on an elevator ride. And, it should be brief enough to fit into a 15-second television clip or newspaper headline.
- **Clear.** Use straightforward language and the active voice.
- **Memorable**
- **Appealing to Hearts and Minds.** If possible, illustrate or use analogy.

One of the biggest challenges that organizations face when creating a message is balancing the different voices at the table, with the need to make one or two key statements. It is important to work together to prioritize what you want to communicate, and make sure that you stick with it. It may mean that some issues might get left out, especially when addressing a complex issue such as income and poverty. But don't forget about them! Brainstorm on other ways that you can get these issues addressed down the road, or integrate them in other components of the advocacy strategy.

Advocacy Allies! Making Your Voice Count! A guide to collaborative health policy development

VOICE: Voluntary Organizations Involved in Collaborative Engagement – This site provides tools and resources designed to assist you in your ability to influence health policy. Use these tools to build relationships, identify opportunities, and find practical ways to influence health policy.

Visit www.projectvoice.ca for more information.

TIP SHEET:

Develop a Position / Position Statement



Developing a position is the most important component of any advocacy strategy. However, for non-profit organizations with more than one member, developing a consensus around an advocacy strategy may prove daunting.

Formalizing your position by developing a Position Statement that is approved by a Board of Directors gives your organization a tool to use with the media. It makes your position clear, and by putting it on your website, makes it public.

One method of soliciting membership input is through membership questionnaires. A simple questionnaire might state or review a list of key government relations issues and ask the membership to rank them in priority from most important to least important. Once the results are tabulated, the association should have a clear direction and mandate from its members to focus on certain key issues. These questionnaires are extremely effective when using the Internet as a delivery mechanism.

However, time and resources do not often allow organizations to canvass its entire membership for a response. The development of issue-specific committees can be the quicker and more cost effective way to develop a position. Short-term advocacy committees or 'Task Forces' are highly effective methods used by associations in developing positions to specific federal, provincial or municipal issues. These committees can be highly effective in tapping member expertise and ensuring that staff fully represents member concerns.

It is impossible to have a detailed government relations or public position for every possible issue that might arise. Sometimes, developing a position on a particular issue may take weeks or months of consultations with your membership or Board of Directors. As a result, organizations are left without a position when they need it most. For example, your organization has an hour to respond to a journalist's deadline and the issue is extremely important to your members, however, you don't have a formal position. Build contingency plans within your organization to address these circumstances. Sometimes developing a position quickly is better than having no position at all.

Advocacy in Action! Position Statement on HIV and Poverty

In 2004, the Canadian AIDS Society released a position statement on HIV and Poverty in Canada. The original position statement is three pages long, and includes a list of specific actions and recommendations of policy reform. However, a position statement does not have to be that detailed. Here is an abridged version that illustrates the key components that a position statement should have. The Canadian AIDS Society encourages local organizations to use this as a model, tailor it, change it, or to simply adapt it to meet your local needs. Having a position with your organization's logo on it available on your website is a good way for local media to quickly find out where you stand on a particular issue.

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Association for Women's Rights in Development. "An Advocacy Guide for Feminists" Young Women and Leadership; No. 1, December 2003. The Association for Women's Rights in Development, 2003. www.awid.org
Wickremaratchi, Sugandhi. "The Tools for Action: HIV/AIDS Treatment Access Advocacy Workshop Series; Participant Package for Tools and Techniques: Level 1." Canadian Treatment Action Council (CTAC), 2005. www.ctac.ca
Williams, Huw. "Building A Solid Association Advocacy Strategy." The Canadian Association e-zine, An Association Xpertise Inc Publication (AXI), 2004. www.axi.ca/tca
Canadian AIDS Society. Position Statement on HIV and Poverty. Adopted by the Canadian AIDS Society Board of Directors, September 2004 www.cdnaids.ca

The Canadian AIDS Society Position Statement on Poverty and HIV/AIDS *(Abridged)*

Adopted by the Canadian AIDS Society's Board of Directors, September, 2004

Context

During consultations with its members over recent years, the Canadian AIDS Society (CAS) has been given a clear message that poverty continues to be a serious issue in the AIDS community in Canada. CAS responded to this challenge, conducted an evaluation of the relationship between HIV, health and poverty, and identified **three** trends:

1. Living in poverty is a determinant of health that increases vulnerability to HIV.

Theories of Population Health and the Determinants of Health clearly link the relationship between poverty and poor health and disease. Research and community-based knowledge of HIV transmission links the constraints and conditions of poverty with some risk behaviours.

2. People who are diagnosed with HIV are at risk of falling into poverty.

Illness often forces many individuals to leave the workforce. Stigma and discrimination in the labour force reduces the opportunities for PLWHIV/AIDS to seek support in the workplace and make alternative working arrangements that meet their health needs. The excessive costs of HIV treatment and lack of access to private insurance plans makes HIV an unaffordable disease. Public income support programs do not meet the financial and health needs of PLWHIV/AIDS.

3. PLWHIV/AIDS who experience poverty or economic insecurity are at risk of having their disease progress quickly, and have a lower quality of life.

PLWHIV/AIDS who do not have the financial resources to meet their needs such as nutrition, housing, access to HIV treatment and illness prophylaxis (prevention of secondary illness), supportive devices, assisted living, etc. are at risk of increased secondary illness and progression of their HIV disease. A lack of financial resources also leads to social exclusion and restricts the ability to participate in a community. These factors reduce the overall quality of life.

The Canadian AIDS Society's Board of Directors calls on the Canadian federal, provincial and territorial governments to re-write restrictive policies that fail to meet the needs of people, increasing their risk of contracting HIV, and significantly reducing the quality of life of people living with disabilities and illness. We are challenging traditional government spending on health and social programs that cause discrimination against the economically marginalised, cutbacks and reduced eligibility for income-replacement programs, and the myth of a workforce that meets the needs of all Canadians. This strategy is failing Canadians and undermining the community based response to HIV/AIDS.

TIP SHEET:

Using Posters



Posters are an important way of getting information to the community. You can use them:

- to mobilize people to support your cause
- to advertise a meeting or specific event
- to popularize your slogans and messages

Posters and pamphlets are very useful, especially in areas where there is no easy access to newspapers and radio. It is a direct way of communicating with the public, but it can also be very expensive. Organizations can easily produce posters and pamphlets. It is important that you clarify the aim of the resource, the target audience and goals.

Design

The target audience sees posters for only a few seconds – usually as they drive or walk past. They can be put up on poles next to busy roads or on walls and windows of shops where passers by can see them.

It is important that they be as large and bold as possible to attract attention and be read easily. Here are some useful tips for producing good posters:

- Make the posters as big as possible. Keep the writing large so it can be read easily from about ten feet away.
- Use as few words as possible (avoid using full sentences). For example “Unite against Poverty” instead of “Let us unite in the fight against Poverty.”
- Don’t put too many words or images on your poster – it may be beautiful, but if the design is too busy important information may not get through to the audience.
- Use bright colours if you can afford it – it will make your poster stand out and attract more attention.
- Be sure the poster is easily recognized as belonging to your organization; use your logo, colours or the abbreviation of your organization’s name.
- Posters are generally expensive to print; an alternative is to make them yourself with coloured markers, pen or paint. To minimize printing costs, one letter-sized original can be designed and photocopied.
- Make your first rough draft and get someone to check the spelling and to proofread it carefully. Spelling mistakes and other errors look very unprofessional.

Purpose:

- Decide on the purpose of your poster, how much money you can spend and how many posters you need. This will help you know how many to produce, what quality you can afford and what method of printing to use.
- Decide exactly what content you want on it. Develop a basic design and get someone who can use a computer to do the layout and print a copy – the printer can enlarge it to fit the paper size you choose.
- Make your final copy and take it to the printers, or organize a working group to hand-make your posters.

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Posting

- In many areas you have to get permission from your local municipality before you can put up posters. Get a copy of the rules in your area and inquire what needs to be done to ensure that your posters are not removed.
- For posters that you want to stick to walls you can buy glue or make your own by mixing flour and water. Use a paint roller and put a thin layer of glue on the wall and stick on the poster.
- For posters that you want to hang on poles you will need clear packing tape. Mount the poster on the pole by taping the top and bottom edges.

Distribution

- Make maps of where the best roads are where people are most likely to see your posters. Good positions are where traffic slows down, like at stop signs and intersections, main roads, busy shops, bus and taxi ranks and railway stations.
- Organize a team of people in your group to put up posters, they can get to know the area and learn the best sites.
- Put up a few posters in a row rather than just one. This gives people in passing cars and buses a better chance to read the whole poster. It also attracts more attention.
- In some areas it is better to put your posters very high on the poles, as it prevents people taking them down easily. You may need to use a ladder for this.
- If your posters get damaged, take them down or repair them quickly so that you don't create a bad impression and your message still gets across.
- After your event, take your posters down.

Advocacy in Action!

Important Decision From the CRTC – Knowledge = Power!

Posting and disseminating information to the public is a form of advocacy in itself, because it educates people on their rights. The following is an example from the National Anti-Poverty Organization (NAPO) concerning phone companies and the right of customers to NOT have their phones disconnected. Posters with information like this were seen on telephone poles in cities such as Ottawa, telling consumers about the ruling.

According to a CRTC decision made May 11, 2004, phone companies can no longer stop local service because of failure to pay all monthly local and long distance charges. Companies like Bell Canada, Telus, Aliant, MTS, NWTel and SaskTel cannot disconnect or threaten to disconnect local calling for non payment when the customer has made sufficient partial payment to cover the outstanding money owed from the local telephone charge portion of the bill. In other words, you can't be cut off local service because of failure to pay long distance and other non-essential charges provided adequate payment on local service is made. Sometimes a family member or friend of the subscriber runs up charges for long distance or other non-essential telephone services that threaten the ability of the family to keep its local telephone service. This decision does not wipe out that debt but simply prevents such a situation from potentially cutting off families from local telephone service.

NAPO, along with the Public Interest Advocacy Centre (PIAC) and a number of other groups, first raised this issue with the CRTC in 2002. Our thanks to PIAC for all their hard work on this submission. If you would like more information on the ruling, contact PIAC at (613) 562-4002.

National Anti-Poverty Organization www.napo-onap.ca

Advocacy Allies! The Public Advocacy Interest Centre

PAIC is a non-profit organization that provides legal and research services on behalf of consumer interests, and, in particular, vulnerable consumer interests, concerning the provision of important public services. Telecommunications is an issue that they have tackled, and have fought against the removal of public payphones, and eliminating phonelessness in Canada. Visit www.piac.ca for more information. This website is available in English only.

TIP SHEET:

Writing Letters to The Editor



Letters to the editor are one of the easiest, most effective ways to increase public awareness about an issue. Most publications reserve space for letters from readers or members of the public. Published letters reach an important audience – decision-makers, community leaders, and people who influence public policy decisions.

Some Tips

1. Start with a little research:

Each publication has its own way of dealing with letters. Most provide some basic instructional information about the length of letters and how they like them submitted

- Look on the letters page or contact the publication to get some basic information about how to submit letters
- Look at the letter being published for examples of format

2. Letters are more likely to be published if they:

- Relate to previous coverage or a topical issue.
- Are short and to the point.
- Are passionate and/or well reasoned.
- Speak to issues the paper thinks are of interest to others.
- Are witty, amusing or provocative.
- Stick to the issue and avoid personal attacks on others

3. Writing:

- Get your ideas down on paper, and then refine or edit.
- Focus on your most important point.
- Have someone you trust read your draft letter for feedback.
- Keep sentences short and punchy.
- If you are having trouble writing, try telling someone what you want to say. Get them write it down, then refine or edit.
- As a general rule, limit your letter to 3 paragraphs, with not more than 3 sentences in each.
- Personal stories are powerful. You do not have to be an expert. Write from the heart.

4. Getting it in:

- The only letters published are the ones submitted.
- Do not be discouraged if your letter is not published. Try again. Your chances improve the more times you write.
- The first letters to arrive are the most likely to be printed. If possible, use fax or e-mail to get the jump on others.
- Lots of letters on the same topic improve the chances of publication and additional coverage.
- There are a lot of different publications. Submit your letter, or a variation, to as many as you like.

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