

10 Tips for Effective Writing about Tax & Budget Issues

- 1. Before you start writing, draft bullets that give the goal of the piece and the two to three points you want to make.** This will help you focus on a specific goal for advancing your overall agenda. The goal might be to identify a new issue, chime in on a perspective that has already been suggested, identify a key moment for advocates or policy makers to act, or report on the outcomes of an issue you've been working on.

Your primary goal should not be to give people background information; rather it should be to advance your mission. Indeed, people generally will not pay attention to, care about, or retain information unless it is in a context that they think is important. For example, offering background information on how government estimates of revenues are calculated is not very compelling, but identifying a flaw in the process that leads to underestimated revenues would be useful in conjunction with a recommendation that policy-makers be willing to allocate more funding than current revenue estimates suggest.

By contrast, an appropriate goal would be to provide people with important information to prepare them to act later. Materials that give people information they need to understand your work can be valuable, if you highlight the information they need to act. For example, a budget primer should always identify the key points at which advocates can intervene, explanations of what to watch for in the process to know when to act, and resources to help people act effectively. It should be a tool for their work, with key elements organized effectively and highlighted.

- 2. Pick the frame and approach that will let you get these messages across effectively.** Usually, when you are trying to persuade people that your point of view is correct, you should start by appealing to a primary value that you and they share—or if not a primary value, a secondary value (see attached list of primary and secondary values, which have been identified by research over several decades.) The reader is much more likely to continue reading, and to decide they agree with you, if they are convinced that your position is based on a value they believe in. The stronger the value to which you appeal, the more likely that people will decide they agree with you.

For example, taking care of yourself and your family is a primary value, while taking care of others is a secondary value. Thus, given a choice between taking care of their own family and other families, people will usually choose to care for their own family.

How does this play out in the tax and budget arena? When the topic of taxes is raised in a values-neutral manner, people tend to consider the issue from their personal viewpoint as a taxpayer. That may well mean they think “the less taxes I pay the better” because the more money people keep, the more they can support themselves and their families, which is a primary value.

Consequently, it is beneficial to frame the issue around an equally strong primary value—perhaps the long-term benefit to the economy and, therefore, the reader's personal job security. Similarly, when you talk about health care, people will care that kids need health care, which is the secondary value of caring for others, but they may be more persuaded to act if you can convince them that it affects their ability to care for their own family—for example, that

created by

THE HATCHER GROUP

Connecting Non-Profit Organizations to Policymakers and the Media

preventive care saves money (taxpayer, and therefore their own, money,) or that if the health care infrastructure is under-funded, ambulance and emergency room services won't be available for their own families when needed.

Not every piece of writing is intended to be persuasive, and in some cases the readers will already know that they share your values. For example, when you are working with a budget committee to analyze policy or draft legislation, and you know that they already agree with your values, you can start immediately with the more technical aspects.

- 3.** For op-eds, press releases, and events where you can select the person who will give the statement, **identify an author who will be a persuasive messenger.** Sometimes this may be a staff member who can speak with technical authority. Sometimes it will be an “unlikely ally”—someone whose authority comes from being an unexpected supporter on the issue. For example, when a university president or law enforcement official talks about the importance of preschool, he or she will be more persuasive than a preschool teacher would be because he or she is not perceived to be speaking out of self-interest. Business leaders are often effective messengers to discuss the need for adequate tax revenues. However, locating a business leader who is willing to speak on your issue may be difficult. Other effective messengers may be affluent people whose family would be affected by the estate tax, fire fighters or police or other leaders who can speak about the effect of reduced tax revenues on essential services, and local political leaders who understand the importance of federal or state decisions for their communities.

Keep in mind, however, that even if you can't locate an unlikely ally to be your messenger, there is still benefit to getting your point of view out in the public arena.

- 4.** **When you are ready to start drafting, design the piece to reach many kinds of readers.** Many readers will read the first paragraph and only continue if it captures their attention; therefore, the headline and first and last paragraphs are particularly important. (For an op-ed, the paper will probably rewrite the headline.) The headline and first paragraph must draw the reader into the piece. If readers aren't intrigued, they won't bother with the rest. The last paragraph should offer some summation of your key point or your request for action—the one idea you want them to remember when they are finished with the piece.

Many readers first skim the headline and subheads, so if you have these in a report, make sure they are clear and tell your story. Other people will first look at the charts to figure out what the report is about. If you are using charts or other visual aids, make sure that they are clear and well labeled.

- 5.** **For a press release or op-ed, start with a hard-hitting introduction that gets the news or opinion out front. Make the introduction engaging.** For an op-ed, that typically means starting out with one or two compelling facts or an anecdote that readers will care about and that frames the entire issue. In some cases, the author's or a partner organization's experiences on the ground can provide a strong starting point: for example, letting the reader know that there has been a flood of people who have lost their jobs coming in for training or legal assistance. Generally, you should try to avoid bogging down an introductory paragraph with a lot of numbers. Instead, you'll want to establish a clear point of view so that the reader has a sense of where the piece is going and feels compelled to read on.

- 6.** **For a report, it's usually helpful to lead with the value, then talk about the program that you are concerned about, and only then talk about the issue that concerns you.** While you may understand why increasing funding for children's health is important, much of your audience may not automatically make the connection. This introductory section can be quite short—just a sentence or two. The goal is to make the connection with the reader that this is something they care about.

For example, if you are writing about SCHIP, first point out that kids need health care to be healthy, do well in school and become productive adults (an argument that builds on the value of taking care of others). Then explain that

SCHIP helps working parents who can't afford health care for their children and don't get it from their jobs, thus explaining the program you are concerned about. Only then should you talk about the need for an increase in funding because of rising costs and the number of un-served kids—in other words, the policy issue at hand.

- 7. Think about the best way to state and use any number.** Put data and numbers in context and make them easy to understand. It is more immediately understandable to say “one out of five” than “20 percent.” And some figures are critically important. For example, most people think the federal poverty income threshold is two to three times higher than it really is. Because of that, it's important to give the actual income amount in dollars and not just refer to the “federal poverty level.”

Most people have very poor understanding of budget numbers and find it hard, for example, to distinguish between millions and billions of dollars. Wherever you can, don't just give the amount; also put the number in context. For example, when you talk about a budget deficit, provide both the dollar amount and the percentage of the state general revenue fund that the deficit represents. Wherever you can, translate budget figures into real-world impacts (for example, the number of elderly who will lose meals, or the number of kids who will lose child care if the budget is cut by a certain amount.)

Use “social math” when possible to translate the numbers into some measure of their impact on society that is easy to understand. Here are a few examples: “Enough money to pay for six new teachers in every elementary school.” “That's more gun stores than hospitals.” “Six acres of wetlands can filter the water supply for an entire city.” Such comparisons should be relevant to the topic. For example, the gun store/hospital comparison reminds people that the more gun stores you have the more demand for hospital services there will be.

- 8. Be careful to use words and examples that frame the debate in the way you want.** Generally, phrases such as “tax burden,” “tax relief,” “death tax,” or “safety net” carry loaded messages that can often distract from your progressive argument. (There are exceptions. For example, it may be appropriate to discuss a family's “tax burden” when writing about the importance of the EITC.) When you highlight the issue confronting a specific family, pick a family that the public would agree is “playing by the rules.” “Poverty” remains a word that often prompts negative images of the person in poverty. It has become less charged, but you should use it only when discussing people in a positive light. For example, that might mean highlighting people who remain in poverty despite holding down two or more jobs.

- 9. Avoid using jargon or “wonky” language.** Instead of using a program name, talk about what it does—for example talk about children's health insurance, not SCHIP—unless the program is extremely well known, like Head Start. Don't use words like “impact” or “partner” as verbs – a common problem in a lot of policy writing. Try not to fill your sentences with too many facts, figures and ideas. No matter what you're writing about or who you're writing for, it is always most effective to keep your words and sentences clean, simple and engaging.

- 10. Before you finalize it, test it with an intelligent lay reader.** That's the best way to make sure that you have written something that is comprehensible for the general public.

BRS Values Groups *...Appealing to Universal Values*

These values groups were developed by Belden Russonello & Stewart based on years of research. They do not appear to change over time the way other values might (such as the importance of education or leisure time.) They are universally shared, and while people give primary values more weight than secondary values, both are strong values. It is best to primary values in your communications work, but appealing to secondary values is also worthwhile.

Primary Values

- Responsibility to take care of one's family. Related values: Obligation to care for emotional wellbeing of family; obligation to care for the physical health and safety of one's children
- Responsibility to care for oneself. Related values: self-reliance; taking responsibility for one's actions; and self-discipline.
- Personal liberty. Related values: Freedom of expression; individuality; independence; freedom from obligations; reproductive freedom.
- Work. Related values: Working hard is good and everyone should work.
- Spirituality. Related values: Faith in God and belief in a spiritual force.
- Honesty/integrity.
- Fairness/Equality. Related values: Justice; golden rule; equal opportunity; tolerance; respect for others.

Secondary Values

- Responsibility to Care for Others. Related values: Care for less fortunate; leave the world a better place for others; care for other species; and care for earth.
- Personal Fulfillment. Related values: Ego-centered: materialism; aesthetic enjoyment. Relationship-centered: emotionally supportive relationships; having children; being married.
- Respect for authority. Related values: obedience to law; respect for institutions; respect for order.
- Love of country or culture. Related values: National pride; loyalty to country; cultural pride.