


National Council for Mental Wellbeing

ADVOCACY HANDBOOK



NATIONAL
COUNCIL
for Mental
Wellbeing



Legislators make decisions every day that will either help improve access to care for those who need it or make it more difficult for your organization to serve your community. If we, as advocates, do not speak up, they will make those decisions without a complete understanding of what their choices will actually mean for constituents.

This handbook will help you focus your power as an advocate and use it in the most effective way possible to advance public policies to strengthen the safety-net and expand access to care.

How to Use this Handbook

The handbook is designed so you may begin anywhere and use some or all of the suggestions. You can read through the entire document to get a broad understanding of how to be an effective advocate or you can dive into specific sections, such as how to have an effective meeting with your legislators. Feel free to pull sections or resources from the handbook and disseminate them among your legislators or clients. While the handbook and resources were developed with federal advocacy in mind, you may find many of the tips and tools useful in your state advocacy.

The Top Three Things You Can Do Right Now

1. Get to know [your legislators](#), their committee assignments and their positions on your issues.
2. Introduce yourself and your organization via email, virtual meeting or in-person meeting.
3. Sign up for [National Council Action Alerts](#).

Join the National Council Ambassador Network!

Ambassadors are our advocacy superstars, the committed people who devote time each year to building relationships with their elected officials. Ambassadors have access to special policy news and updates from the National Council, along with exclusive training and information to help them build relationships with their legislators and staff. Interested? [Join the Ambassador Network or get more information](#).

Questions?

The National Council is here to support you as you build relationships with your legislators. If you have questions or need additional support, please contact Policy@TheNationalCouncil.org. We would love to hear how your meetings with legislators go and what information they shared with you.

TABLE OF CONTENTS

Effective Advocacy: Do Your Homework.....	2
It is Not Just One Meeting: Build Relationships with Legislators.....	4
Emails, Calls and Social Media: Stay in Contact with Legislators.....	5
Who You Are, What You Do: Introduce Your Organization	7
Virtual Meetings: Tips for Virtual Meetings and Site Visits	8
The Golden Ticket: Hold an Effective Legislator Meeting	9
In the District: Stay Connected to Legislators in Their Communities	11
You Can Start Anywhere.....	12



EFFECTIVE ADVOCACY: DO YOUR HOMEWORK

Over 200 million communications, mostly electronic, reach the U.S. Congress every year. Legislators receive many competing messages on a wide variety of issues affecting their constituents. Doing some advance preparation will help ensure your message is heard.

Know What Matters to Legislators

Sometimes, legislators vote based on ideology or party unity. However, they do not have predetermined views on every single issue that comes before Congress and constituents play an important role in educating them about making the right policy choices.

What Motivates Legislators?

- Compelling **personal stories** told by constituents. These provide an emotional hook and an engaging way to talk about the issue with their colleagues and the press. See [Crafting a Compelling Story](#) for a template example.
- Data about the **economic impact** a policy would have on their district or state, especially when presented in terms of job losses or potential economic growth.
- Data or stories about how that **policy could make life better or worse** for the people in their district. Hearing from **dozens, hundreds or thousands** of their constituents urging them to take a stance.
- Hearing from just **a few key constituents**, like friends, interest group leaders or others who have **built a strong relationship** with them. See [It is Not Just One Meeting: Build Relationships with Legislators](#) for more tips.

REMEMBER, just because your recommendation is good public policy, it is not always sufficient to win a legislator's support. They need to know that it is **important to large numbers of voters**, to the **well-being of their constituents** and to the **economic health** of their district. As former Senate Majority Leader Everett Dirksen said, "When I feel the heat, I see the light."

Know Your Legislator

Find out who your federal, state and local officials are on the National Council website's [Find Your Officials](#) page. Before communicating with or visiting with your elected officials or their staff, you should know as much as possible about the people with whom you will be meeting.

Important information to know:

- Their personal history: Do you have anything in common?
- Their election history: Are they facing an election or primary this year?
- Committees and subcommittees on which they serve: Do they have a role in committees that oversee mental health or addiction policy? To learn more about congressional committees, refer to [Helpful Congressional Info](#).
- Leadership assignments: Are they an influential leader in their party?
- Issue interests: Do they care deeply about health care?
- Are they a long-time supporter of mental health and substance use issues?
- Do they have a personal or family history of mental health or addiction?
- Is your legislator a fiscal conservative focused on return on investment?
- Is it their priority to bolster the safety-net and social services?
- Is your senator or representative a veteran?
- Have they championed senior citizen issues?

Where to find information:

- Find their website, Facebook and Twitter by entering your information on our [Find Your Officials](#) page and selecting your legislator.
- Sign up for their newsletter.
- Check [congress.gov](#) to see what bills they have cosponsored.
- Email Policy@TheNationalCouncil.org to find out if we have worked with that legislator on behavioral health issues before.

Know Your Issue and Your Objective

As you plan for a scheduled meeting or prepare to send correspondence:

- Develop a clear understanding of what you hope to convey and what you want to accomplish.
- Have a clear “ask” – something specific you will ask the legislator to do such as vote for House Bill 1 or contact Chairman Jones and ask them to agree to XYZ.
- Prepare to share a story to put a human face on the issue.
- Be able to answer questions on the issue or know how to get answers. It is OK to say you do not know, but find the answer and be sure to follow up with them.
- Consider developing a one-page summary of the issue or legislation.

Know the Staff

The staff of a senator or representative are of tremendous importance in the legislative process, as they do much of the hands-on work. Staff will often have issue-area expertise and legislators rely on them for advice and guidance when it comes to taking positions on particular issues. To have maximum impact with your senator or representative, **you will need to cultivate strong relationships with their staff.**

- Each U.S. senator has roughly two or three dozen staff members. Each representative has 12-15 staff. Legislators have staff in Washington, D.C., and in their home districts. Learn more about their functions with [sample job descriptions](#).
- House and Senate committees have professional staff that assist legislators in the deliberations of those committees. These staff are often issue experts with influence over bills before their committee. For a list of important committees, go to [Helpful Congressional Info](#).
- Do not be concerned if you meet with staff instead of the legislators themselves - members' schedules are often subject to change suddenly based on vote schedules and other matters.
- When reaching out to staff about policy issues, always begin with the legislative assistant (LA) for that issue. For mental health and addiction issues, this will usually be the health LA.
- It can also be useful to be in contact with the senator's or representative's committee or subcommittee staff, as well as district staff in your state.



IT IS NOT JUST ONE MEETING: BUILD RELATIONSHIPS WITH LEGISLATORS

If your elected representatives know you as a voter, constituent, friend and supporter, they are likely to be more responsive to you than if you only contact them when you are in need. The best time to get to know your legislators is when they are back home and less distracted by the business of Congress. Effective advocacy often takes time. Visit your senator or representative, virtually or in-person, to get to know them better and educate them about mental health and addiction issues in their district.

Connecting with all of your legislators is important even if you didn't vote for them or they may disagree with you on some policy issues. If legislators do not seem to care about mental health and addiction policy, it does not mean you should ignore them. Rather, have an opportunity to educate and influence them about the importance of your issues. But you do not need to have a friendship or strong relationship with all of your legislators. In fact, it may be most beneficial to focus more of your time on one legislator who is most interested in health care or who has an important leadership or committee position. The [National Council Policy Team](#) can help you determine who these legislators are.

10 Ways to Build Relationships with Legislators and Their Staff

- 1. Invite them to an event you are hosting or to your office or facility for a site visit.** This allows them to get a first-hand understanding of the work you do and how it matters to the people you serve.
- 2. Help generate positive media attention** when legislators visit your organization by working with their staff to develop and submit a press release with photos.
- 3. Attend in-district events** such as town hall meetings. These are a great way to bring your issues to their attention and speak with them personally.
- 4. Establish yourself as a helpful expert** their staff can turn to when they have questions about an issue. Provide useful, balanced information that informs and establishes you as a person they can turn to when they need to know more.
- 5. Help legislators when their constituents have a behavioral health related issue** by being available to answer any questions they or their staff might have.
- 6. Say thank you.** Legislators and their staff are constantly bombarded by requests and demands, often couched in less-than-polite terms. Showing appreciation for their position or vote on a particular issue means a lot to legislators and staff.
- 7. Write a letter to the editor** of your local newspaper mentioning your legislator when they support or otherwise advances your issues in the Congress.
- 8. As a private citizen, contribute to and/or volunteer for campaigns of your choosing.** This shows legislators that you support the work they are doing in Washington and gives you additional opportunities for interaction and relationship building. (Note: keep in mind that nonprofits are bound by different rules than individuals when it comes to making campaign contributions. Be careful to only contribute from your own finances in your role as a private citizen.)
- 9. Follow and interact with your legislators on social media.** Visit our [Find Your Officials](#) page to see your legislator's Twitter handles and Facebook pages.
- 10. Join the [National Council Ambassador Network](#).** Because "all politics is local," Ambassadors highlight the local impact of federal policies - and when votes come down to the wire, their relationships with legislators give them outsized influence in tipping the scales. The National Council will give you the tools and help you need to build these relationships.

STAY IN TOUCH. Do not wait until you need something from your legislators to communicate with them. Let staff know if you or your organization are featured in a recent news story or have good news such as receiving grant funding. But be judicious! Do not be the person who clogs staff inboxes.

EMAILS, CALLS AND SOCIAL MEDIA: STAY IN CONTACT WITH LEGISLATORS

Email is the most efficient way to communicate with your legislators. Focus your attention on your own legislators and those whose constituents are served by your organization. Staff keep a tally of the contacts they receive on particular issues so they can report to their boss the number of constituents who have contacted them for or against that issue. While quantity is valuable, it is really the quality of the message that is key. Sharing personal stories about your organization, your clients, and the communities you serve are most useful to staff. Personalizing your email is key!

Tips for Writing to Your Legislators

- If you know the name of the staff person responsible for behavioral health issues, **address the email to them personally**. If not, send the note to the legislator using the general contact form provided on their website and it will be routed to the appropriate staff person.
- Remember to include your home address or your organizational address in the email. The email means more coming from a constituent or an organization providing services to their constituents.
- **Keep the message short and to the point** and be sure to proofread. Use appropriate grammar and avoid typos.
- Use the legislator's title and last name (e.g., Dear Senator Stone) in the salutation line. Avoid generic terms, such as decision-maker or senator.
- Tell your legislator **specifically what you would like them to do** in your opening sentence (e.g., vote for House Bill 1 or contact Chairman Jones and ask them to agree to XYZ).
- Support your request with two or three sentences of relevant facts, avoiding jargon and acronyms that they may not understand.
- Share the **number of people in their district who will be affected** and how by the proposal under consideration with your legislator.
- Remind your legislator of your expertise on the issue (years of experience in the field, with your current employer and other professional or community involvement).
- Use a polite tone and avoid things like all caps that can seem negative or threatening.
- **Politely request** a commitment for their support.
- Attach any relevant materials, such as one-pagers about your organization or the issue area you are writing about.
- If you do not receive a written reply or telephone response to your email or letter within a month or so – email or write again and enclose your original message.
- Once you get a reply, be sure to **thank the person who sent it to you** and commit to remaining in touch with them.
- If you receive a response with which you disagree, email or write your legislator again and politely commit to remaining in touch on this important issue.
- If you get a form letter back that does not address the concerns you raised, do not be discouraged. **Seek out staff to meet with** in D.C. or in your district to talk about your organization's work and share how the policies you raised would affect your clients. Relationship building takes time!

The volume of email staff receives increases every day, so **building and maintaining personal relationships** is increasingly important. It is often said that the most important aspect of an email is the “from” line.

Finding the Right Email Address

Most legislators have submission forms on their websites for sending messages to their office. These messages are sorted by issue category and routed to the appropriate staff. You can also obtain email addresses for specific staff by calling the legislator's main Washington, D.C., office. The Senate and House use similar formats for email addresses.

Senate offices use: firstname_lastname@senatorlastname.senate.gov (Example: joe_smith@anderson.senate.gov)

Representative office use: firstname.lastname@mail.house.gov (Example: mary.jones@mail.house.gov)

Calling Your Legislator

Telephone calls to legislators and staff are important, especially when a bill is nearing consideration in a subcommittee or committee or on the floor for a vote. Calls are also much harder for staff to ignore than emails and often help an issue rise to the top of the staff priority list. A coordinated calling campaign from constituents can be very effective to ensure that the legislator hears about the issue and is often more influential with staff than an email campaign.

All D.C. legislative offices can be reached through the U.S. Capitol switchboard at 202-224-3121. If you want to speak to a legislator or staff when they are visiting their district, use the phone number for their district office(s), which can be found on their websites.

- **Be prepared.** Understand that you will not speak directly with the legislator; you will need to leave a message. If you know the name of the staffer who handles behavioral health issues, leave a specific message for them.
- **Be polite.** Staff work hard to answer the phones all day long. Know that no matter how strongly you feel about an issue, your message has a much better chance of getting through if you keep your cool and thank them for their time.
- **Be concise.** Plan in advance what you want to say. A brief personal description of your connection to the issue, followed by a concrete ask, is best. For example: *“I am a person living with depression and I often struggle to access the treatment I need. Please vote for HR 1, which provides funding to help people like me.”*

Social Media

Most legislators maintain Twitter feeds, Facebook and Instagram pages. You should “follow” their page on Facebook and Instagram and follow them on Twitter. However, legislators rely less on social media to collect information from their constituents. Email, phone and in-person visits are the best way to communicate your policy priorities and ask your legislators for their support.

Twitter and Facebook may function primarily as a means for legislators to keep a pulse on their public image, much like monitoring the local and national newspapers for coverage of their activities. By tagging legislators appropriately in your posts, you may be able to alert legislators and their staff to conversations about important policy issues. Following your legislators on social media will provide information on their interest areas, positions and priorities. You can also find out what events they may be hosting or attending in the district.

When using social media to communicate with legislators, remember to tag them in the post. For Twitter, this means using the @ symbol and their Twitter handle (e.g., @NationalCouncil). On Facebook, the same rule applies, but with the @ symbol and name, a box will populate with the legislator’s page/name, you can then click on the box to highlight the legislator’s page.

Visit our [Find Your Officials](#) page to see your legislator’s Twitter handles and Facebook pages.



WHO YOU ARE, WHAT YOU DO: INTRODUCE YOUR ORGANIZATION

Most legislators and their staff know little about community-based mental health and substance use treatment. *That is not a bad thing.* It gives you the opportunity to fill them in, to teach them what they need to know about your issues and to be considered an expert on behavioral health. When meeting with a legislator, your introduction is your chance to help them see your passion, your personal story or your impact on their district. Be prepared to provide basic information and any other information that will give your legislators an idea of what your organization does.

Example: "We serve ____ people in ____ counties in your district. We employ ____ people. We help ____."

For consumers or family members, be prepared to share a brief statement about why you are passionate about mental health or addiction. You do not have to tell your whole story but sharing a small piece of it will help your legislator and their staff understand why behavioral health issues are important to people in your community.

Example: "I receive(d) services at _____. Before that, I _____. Now, I _____."

Information to Share

You may not be able to get to all the following items in the short time you have to introduce yourself and your agency. You should consider which you think might be the most important or influential to the legislator you are meeting.

- Where do you live in their district and how long you have resided there?
- Where are your organization's programs located?
- Who does your organization serve?
- What kind of services do you provide?
- What impact does your work have on people's lives? For example, reduced hospitalizations, increased employment, etc.
- How many people does your organization employ? How many does it serve?
- How does your work contribute to a stronger and safer community?
- Why are federal and state investments in your services and community-based organizations a good allocation of taxpayer dollars?
- What barriers do you face in providing services in their district?
- What can Congress do to help you succeed?
- Is there anything the legislator has done in the past that was especially helpful to you or your organization? Be sure to thank them if there is

REMEMBER: Keep your introduction brief – you will have plenty of time to share more info later in the conversation. Aim for a 30-second introduction that illustrates your relevance to the district and the issues at hand. Do not forget to practice!

Organization Fact Sheet

Consider developing a one-page document that will provide the information recommended above and can be referred to by the legislator or staff at a later date. Send your fact sheet in advance of the meeting. This will allow you to refer to the document in your introduction and leave time to make a more personal connection. This document should be simple and concise. Use images and graphics that will grab attention. Refer to [Introducing Your Organization](#) for a template.

VIRTUAL MEETINGS: TIPS FOR VIRTUAL MEETINGS AND SITE VISITS

While many congressional offices may not have considered virtual meetings before, the global COVID-19 pandemic has changed the way constituents can interact with their legislators. Members of Congress and their staff have begun doing virtual meetings and site visits with their constituents and many have reported that they prefer these types of meetings. They are safe, do not require travel for either party and allow the legislators to meet with more constituents than they could have before. While much of the process is the same as for a face-to-face meeting that we laid out in the previous section, here are some additional tips for virtual meetings

Before the Meeting

- Decide if you would like the meeting to be a standard virtual meeting or if you would like to invite your legislator to a virtual site visit.
- Use the same guidelines for scheduling a virtual meeting as you would an in-person meeting, simply indicate that you would like the meeting to be virtual when you are requesting a meeting on their website or through [email](#).
- Ask which virtual platform your legislator's office prefers and offer to set up a meeting in that platform.
- Include the one-page introduction sheet in your email.
- Practice your talking points. Work with other attendees to make clear who will introduce the group, who will speak next, who will cover which talking point, etc.
- Test the technology. Make sure your videos and microphones are working. Do a test run with the virtual platform with your staff.

During the Meeting

- Look directly into your camera and speak slowly and clearly.
- Turn off other applications on your computer so you are not distracted by pop-ups or notifications.
- Ask if the legislator and their staff are willing to be photographed. If yes, you can take a screenshot and share this picture in your newsletter or social media. If posting online, be sure to tag the legislator.

After the Meeting

- Follow the same steps for the face-to-face meeting and send a follow up email.
- Share the screenshot if you took one.
- Let the [National Council](#) know how the meeting went.



THE GOLDEN TICKET: HOLD AN EFFECTIVE LEGISLATOR MEETING

There is no substitute for the opportunity to communicate face-to-face with your legislators. They get to hear your story unfiltered and direct from you and gain a sense of your dedication to issues important to you and others within your community. Do not be intimidated, your representatives want to hear from their constituents and those who serve them. Once it is safe to do so and your legislator is holding in-person meetings again, take advantage of this opportunity.

Before the Meeting

- Only schedule meetings with your own elected officials or those whose constituents you serve.
- Do your best to have a legislator's constituent attend the meeting with you. Let the legislator's office know who will be coming with you and their role or interest in the area, note all constituents who will be in attendance.
- Use the meeting request process on their website three or four weeks in advance. If possible, avoid requests that are last minute (anything less than a week). See [Requesting a Meeting](#) for a template letter you can use as an email request.
- Include the one-page introduction sheet in your email. See [Introducing your Organization for a template](#).
- Follow up by phone to be sure your request was received. Avoid sending multiple email requests for the meeting. The schedulers are juggling a lot of requests and may take a little while to get back to you.
- Do your homework. Refer to [Effective Advocacy: Do Your Homework](#) to learn what important information you should know about your legislator before meeting with them.
- Pick your "ask" and select supporting points or stories you want to share. It is better to focus each meeting on one issue than to bombard them with multiple requests.
- Do not hesitate to meet with staff if the elected official is unavailable.
- Practice your talking points. Work with other attendees to make clear who will introduce the group, who will speak next, who will cover which talking point, etc.

TAKE YOUR MEETING TO THE NEXT LEVEL:

Invite allies and community partners to help make your case!



- Show up 10 minutes early. Never be late yourself but be understanding if the legislator or staff are late.

During the Meeting

- Always address your legislator as “Senator,” “Congressman,” or “Congresswoman” even if you already know them.
- Focus on one issue per meeting and assume you will have ten minutes to make your case.
- Do not forget to ask for something concrete. For example, “Please sign on as a cosponsor to HR 1” is better than “Please support prevention policies.”
- Tell them a little about yourself and your organization.
- Leave time for the legislator’s constituent to speak at the meeting. These are the attendees the member is most interested in hearing.
- Answer questions the member or staff may have. If you are not sure of the answer, tell them that you will find it and get back to them. Never provide inaccurate or false information. [Check out What to Do When a Legislator Says ...](#)for guidance.
- Leave them brief information on your organization and the issues you are discussing. One-pagers with bullet points are best – staff do not have time to peruse long handouts.
- Invite them to an event or a site visit so they can see firsthand what you are all about.
- Thank them for their time and ask what you can do for them.
- Ask if the legislator and their staff are willing to be photographed. If yes, you can share this picture in your newsletter or social media. If posting online, be sure to tag the legislator.

After the Meeting

- Always send a brief thank you within a day or two of your meeting. Refer to [Meeting Follow Up](#) for a helpful template.
- In the same email, offer to answer any additional questions.
- Send the documents you provided during the meeting if you were not able to send them before the meeting.
- Share the picture you took

ADVICE FROM A NATIONAL COUNCIL AMBASSADOR:

Stress local impacts! Share the positive impacts your organization is having in the member of Congress’ district.

Feedback on the results of your visits and correspondence is of tremendous value to National Council staff when planning strategy and activities supporting our advocacy objectives. **[Reach out and tell us how your meeting went.](#)**



IN THE DISTRICT: STAY CONNECTED TO LEGISLATORS IN THEIR COMMUNITIES

The weeks when Congress is not in session are an excellent opportunity to build relationships outside of the busy legislative session.

Attend a Town Hall

Town hall meetings are often held virtually or at a local gathering place. Attending one will give you the opportunity to ask questions of your elected officials and voice your opinions on the issues. Some legislators are taking advantage of technology to allow participation from more people. For example, telephone town halls follow the same model as a regular town hall meeting but allow you to participate from home. Others are also turning to Twitter to hold Tweet Chats, where anyone can participate in the dialogue by using a common hashtag. You can find out about upcoming meetings or chats by checking the legislator's website or by following them on social media.

Organize a Site Visit

Invite your senators and representatives to visit your site so they can see the great work your organization does in their community. Site visits can also be done virtually.

Suggestions for site visits:

- Invite your legislator in person, by letter, telephone or email either directly or through staff, depending on how well you know the legislator. Refer to [Site Visit Request](#) for an email invitation template.
- Plan your time with your legislator at your organization carefully as they are often on a tight schedule.
- Find out who will be accompanying your legislator on the visit.
- Brief employees who are to be involved in advance about what is expected of them and how they can help you stay on schedule.
- Consider asking clients and family members to spend a few minutes with the legislator and share their stories. See [Crafting a Compelling Story](#) for helpful tips.
- Have a photographer take pictures for use in the legislator's newsletter or website and make them available to the local press.
- Assist the legislator's office in writing a press release to be sent to local media along with photos, or if your legislator prefers, issue one from your organization.
- Follow up with a thank you letter to your legislator after their visit.
- Stay in touch. Keep the legislator and staff informed about issues important to your organization.

Organize a Virtual Community Event

Organizing a virtual community event with your legislator can be time consuming but is valuable in establishing or strengthening relationships with your elected officials. This is particularly true for groups of like-minded constituents who want to discuss the same issue and highlight work that is taking place in the community around that issue. Much of the preparation for a site visit is required for a community event.

Additional suggestions:

- When you invite your legislator in person, let them know the purpose of the meeting and who will be there.
- Invite other organizations and community members who share your goals or advocacy agenda.
- Be sure to approve any additional speakers with the legislators.
- Brief attendees to be involved in advance and stay on schedule.
- Draft materials to explain the issue and highlight any legislative asks.
- Invite local media to attend the event but be sure to check with the legislator first.
- Understand that staff may attend in the legislator's place.

YOU CAN START ANYWHERE

Nervous about getting started? One of our seasoned advocates in the National Council Ambassador Network offers one simple piece of advice: Just do it! Do not feel intimidated by advocacy, you are prepared to effectively communicate your concerns, opinions and needs with your legislators. Remember they are public servants and want to hear from you about how they can help you achieve your mission.

The National Council stands at the ready to work with our members and partners to ensure that effective mental health and substance use services are readily available and encourages you to start building relationships with your legislators. If at any time you have questions about the handbook, how to use it to work with legislators or staff or would like to provide any suggestions, please contact Policy@TheNationalCouncil.org.

Five Quick Steps to Get Started

- 1** Find your [legislators](#).
- 2** Subscribe to their newsletters and follow them on social media.
- 3** Schedule a meeting with your legislators.
- 4** Report back to the [National Council](#) on how your meeting went!
- 5** Sign up for [National Council Action Alerts](#).

ADVICE FROM A NATIONAL COUNCIL AMBASSADOR: Just do it! It starts with building relationships locally and during campaigns. Make yourself the expert that they look to for information on behavioral health.

Helpful Resources

- National Council [TheNationalCouncil.org/policy-action](https://www.thenationalcouncil.org/policy-action)
- U.S. House of Representatives [house.gov](https://www.house.gov)
- U.S. Senate [senate.gov](https://www.senate.gov)
- Congressional Management Foundation [congressfoundation.org](https://www.congressfoundation.org)

APPENDIX 1

A STRONG TEAM: RECRUIT ALLIES TO HELP MAKE THE CASE

The messenger is important and sometimes the smartest and most effective thing you can do as an advocate is to step back and let someone else make the case on your common issue or goal. Based on what you know about your legislators' interests and concerns, think about additional allies you can recruit to help deliver your message.

Potential Allies

- Local departments of health
- Local social support services
- Other nonprofits who serve your clients
- Law enforcement
- Criminal justice
- Child welfare organizations
- Veterans organizations
- Hospital executives or emergency department physicians

Steps to Engaging New Partners

- Join other coalitions with other like-minded agencies and organizations as members.
- Build relationships with other groups and individuals so that the first time they are hearing from you isn't with an advocacy ask. Send an email outlining the problem your community faces, your proposed solution, and what they can do to help.
- Follow up with a phone call to answer any questions they may have. Remember that potential advocates are more likely to heed your call to action if you ask them to engage in one specific task at a time.

Potential Asks for Partners

- Emailing or calling their legislators in support of your cause or organization
- Writing a letter to the editor of their local paper
- Attending a local meeting or event organized around this issue
- Signing a petition
- Signing on to group letters of support for a particular issue
- Disseminating information about your cause to their networks
- Forwarding your call to action via email and social media
- Helping you make connections with key legislators, other community organizations, and other potential allies

Things to Consider When Working with Other Advocates

- **Know the mission, values and goals of the potential partner organization** and be prepared to explain to them how partnering with you on this advocacy effort will help advance their mission and goals.
- **Ask for something specific.** For example, telling a representative of another organization that you should work together to help people with mental illness is much less likely to yield a response than asking them to send a letter of support for your cause to the governor.
- **Be flexible, if possible.** Sometimes, a group might have concerns about your cause or might not be able to come on board unless you slightly revise the scope or direction of your advocacy campaign. Give them a chance to fully express their thoughts and consider what they say. While you can never please everyone, it is often helpful if you have the flexibility to make minor adjustments to accommodate others. Even if you cannot change your course of action, at least you have established a line of dialogue with the other group that will be helpful in future interactions with them.
- **Be open to hearing about other ways they would like to collaborate.** Maybe that group does not engage in lobbying, but they are willing to disseminate your call to action via their email networks.
- **Stay connected.** Once someone becomes invested in your cause, they want to know that their participation is making a difference. Keep individual advocates and partner groups updated.
- **When you are thinking about what groups to engage in advocacy around a particular issue, get creative!** Sometimes, it is the unexpected groups that can provide the biggest bump in your influence. For example, organizations that represent law enforcement officers or emergency room physicians can be helpful when you are advocating for increased funding for mental health service.

The pace of Congress is frantic and becomes more so as the session nears its conclusion. Check in with your senators and representatives and their key staff early in the session (which begins every two years, in odd-numbered years) to lay out major issues and policy positions.

The Budget Process


In addition to important bills, many of your legislative priorities will be addressed through the annual appropriations process. The budget process begins each year when the President submits the budget requests to Congress. The Senate and House Appropriations Committees then begin deliberating and amending the budget to craft their own budget bills. In the course of the usual budget process, these 12 bills would then be passed by each chamber, with differences worked out in a conference committee. However, sometimes when compromise is difficult to reach, any remaining appropriations bills can be bundled into one omnibus bill for passage en masse. The budget process can be unpredictable, which is why it is important to remain in touch with your Appropriations Committee members throughout the year.

Key Congressional Committees

Committees are essential to the legislative process in Congress. Each committee has jurisdiction over a certain set of issues and the members of that committee get the first crack at revising and voting on bill. Visit the key committees' websites to find out if your legislators serve on one of the following committees.

Senate Appropriations Committee

As the largest committee in the U.S. Senate, this one writes legislation that allocates federal discretionary funds to the different government agencies, departments and organizations, including the Substance Abuse and Mental Health Services Administration (SAMHSA). As an example, funding for the Primary Care-Behavioral Health Integration program goes through the Appropriations Committee before becoming available.

 appropriations.senate.gov

Senate Finance Committee

This committee handles several issues related to health programs financed by a specific tax or trust fund, including Medicaid, Medicare and the Children's Health Insurance Program. Any Senate bill that is related to taxes must come through this committee.

 finance.senate.gov

Senate Health, Education, Labor and Pensions (HELP) Committee

This committee has jurisdiction over the country's health care (except for the health care programs under the finance committee's jurisdiction) and oversees public health and health insurance statutes. The committee reviews all matters related to health care and reports on these issues to Congress.

 help.senate.gov

House Appropriations Committee

Similar to the Senate Appropriations Committee, this committee is responsible for deciding how the federal government spends money and which programs will be funded.

 appropriations.house.gov

House Energy and Commerce Committee

This committee maintains legislative oversight in a multitude of areas including public health, environmental health and telecommunications. Its jurisdiction extends over several agencies, including the U.S. Department of Health and Human Services. It also has jurisdiction over Medicaid and parts of Medicare.

 energycommerce.house.gov

House Ways and Means Committee

The Ways and Means committee is responsible for writing taxes and has jurisdiction over Social Security, parts of Medicare and enforcement of child support laws, to name a few. Similar to the Senate Committee on Finance, any House bill that has anything to do with taxation must come through this committee.

 waysandmeans.house.gov

House Education and Labor Committee

This committee has jurisdiction over all things related to education and labor. This includes access to quality health care for working families, services for at-risk youth and programs for low-income populations.

 edlabor.house.gov

Guide to Creating a One-pager on Your Organization

Providing a one-page fact sheet about your organization is a great way to familiarize your legislator with who you are, who you serve, and what impact your services have on your community. This fact sheet should tell your legislators at a glance all the most important things they need to know about the difference you make in people's lives – both as an employer and a provider of make health care services.

Need ideas about what to say? Here are some examples of what information to include.

Make it fun: You can include your mission statement, interesting information about your organization, and even a picture! Consider providing information about:

- **Size of organization**
 - » What kind of organization are you? (e.g., a community mental health center, addiction treatment organization, hospital)
 - » Number of staff employed
 - » # of beds (if applicable)
 - » # of locations
 - » Counties/cities served
 - » Annual budget
- **Clients served**
 - » Number
 - » Diagnostic mix Medicare/Medicaid numbers served (or % served)
 - » Number of veterans/military members served
- **Services provided**
 - » Therapy/substance treatment/family/child, etc.
 - » Residential, employment, supportive housing, detox, etc.
- **How your clients benefit from your services**
 - » Explain how your services help clients lead full and productive lives in recovery.
 - » Consider telling a story of one client who did especially well.
- **Contact information for organization**
- **Organization website**

Remember to keep it brief and easy to read! (Think pictures, a map of your service area, bulleted lists, creative subheadings, etc.) Do not forget to include your name and contact information so they know how to follow up with you.

Avoid jargon! Staff typically do not have much background in direct service delivery and will not have an intuitive understanding of what terms like, “cognitive behavioral therapy” or “family psycho education.” Use easily understandable layperson’s terms to explain not just what services you provide, but what impact they make in clients’ lives.

REQUESTING A MEETING – TEMPLATE

Instructions: Create this letter on your organization letterhead and email it to the legislator’s scheduler or submit it through their meeting request form online. Send three-to-four weeks in advance of when you would like the site visit to take place. Do not forget to attach the one-pager if you are able to, some online meeting forms may not allow attachments. Make edits depending on whether the meeting will be virtual or in-person in their District Office or in-person in their Washington, DC office.

[Date]

Attn: Scheduler

The Honorable *[Name of Senator/Representative/Governor]*
[Local or D.C. Office Address]

Dear *[Senator/Representative/Governor] [Name]:*

I would like to request a time to meet with you to discuss *[insert specific issue or policy concern]* and how this impacts our ability at *[Name of Organization]* to provide services for individuals with mental health and substance use conditions in *[your organization’s service area]*.

[Name of Organization] employs *[insert number]* staff who serve *[insert number]* individuals (or families) in *[service area]* through varied programs *[insert short description of programs or services]*. I have attached a brief fact sheet with more detail about our services, clientele and areas served. *[If you do not have a fact sheet, insert a couple of sentences addressing these areas. You can also insert a sentence or two about a specific program or clientele served that you want to highlight.]*

My staff and I look forward to the opportunity to meet *[virtually/in your district office/ in your Washington, D.C., office]* with you and are flexible based on your schedule. I will follow up with your scheduler in a few days to further discuss this. In the meantime, should you have any questions or if I can be of service, please do not hesitate to contact me at your convenience at *[your phone number and email address]*.

Sincerely,

[Name]
[Organization Name]

▶▶ [Download Template](#)

Instructions: Create this letter on your organization letterhead and email it to the legislator’s scheduler or submit it through their meeting request form online. Send three-to-four weeks in advance of when you would like the site visit to take place. Do not forget to attach the one-pager if you are able to, some online meeting forms may not allow attachments. Make edits depending on whether the site visit will be virtual or in-person.

[Date]

Attn: Scheduler

The Honorable *[Name of Senator/Representative/Governor]*
[Local or D.C. Office Address]

Dear *[Senator/Representative/Governor] [Name]:*

I work at *[Name of Organization]* and we provide services for individuals with mental health and substance use challenges in *[your organization’s service area]*. It would be my pleasure to host you and your staff for a *[virtual]* site visit when your schedule permits. I would greatly appreciate the opportunity to introduce you to our Board of Directors, clients and staff and give you a virtual tour of our organization so you can see firsthand the value we provide to *[your organization’s service area]*.

[Name of Organization] employs *[insert number]* staff who serve *[insert number]* individuals (or families) in *[service area]* through varied programs *[insert short description of programs or services]*. I have attached a brief fact sheet with more detail about our services, clientele and areas served. *[If you do not have a fact sheet, insert a couple of sentences addressing these areas. You can also insert a sentence or two about a specific program or clientele served that you want to highlight.]*

My staff and I look forward to the opportunity to meet with you and are flexible based on your schedule. I will follow up with your scheduler in a few days to further discuss this. In the meantime, should you have any questions or if I can be of service, please do not hesitate to contact me at your convenience at *[your phone number and email address]*.

Sincerely,

[Name]
[Organization Name]

▶▶ [Download Template](#)

POST-MEETING THANK YOU LETTER – TEMPLATE

Instructions: Create this letter on your organization letterhead. You can email it to the staffer you worked with to schedule the meeting. Include any additional information you promised you would include. Send within a week of the meeting.

[Date]

Attn: Scheduler

The Honorable *[Name of Senator/Representative/Governor]*
[Local or D.C. Office Address]

Dear *[Senator/Representative/Governor] [Name]:*

Thank you for your *[site visit to /meeting with] [Name of Your Organization]*. We greatly appreciated the opportunity to speak with you about some of the programs that are offered through our organization and hear your views on ways to support and improve mental health and substance use services.

During our meeting, I shared information about our organization, the services we offer and the challenges we face in meeting our clients' needs. We are eager to provide high-quality evidence-based services that meet the needs of individuals with mental health and substance use problems and appreciate support from our elected officials.

As we discussed during our visit, *[briefly reiterate one or two messages you discussed in the site visit about why this is needed. If you discussed a specific piece of legislation or action, mention that again]*.

We would welcome any opportunity to serve as a resource to you as you consider policy choices that have implications for community providers such as *[Name of Your Organization]*. Thank you again for your visit and I look forward to speaking with you in the future regarding *[piece of legislation or action]*. Please let me know if I can ever be of service to you or your staff.

Sincerely,

[Name]

[Organization Name]

[Contact information]

▶▶ [Download Template](#)

CRAFTING A COMPELLING STORY

Whether you are talking to a reporter or a legislator, stories about the people you serve and the work you do will be what they remember most. Crafting a compelling story shows your audience the value of your organization, the impact you have on your clients, and the overall impact you have on your community.

When telling your story, keep the following questions in mind:

<p>Who is Your Storyteller?</p> <ul style="list-style-type: none"> • Your organization’s staff • Your organization’s board or members • Consultants • Clients • Community partners such as a sheriff or teacher 	<p>Who is Your Audience?</p> <ul style="list-style-type: none"> • Federal legislators • State legislators • Media
<p>How do You Want Your Story to Move Your Audience to Action?</p> <ul style="list-style-type: none"> • Introduce or cosponsor legislation • Vote yes or no on a piece of legislation • Advocate for funding with their colleagues • Recognize you/your staff as experts on the topic • Publish an op-ed • Cover an important news story 	<p>What compelling Information Can You Share?</p> <ul style="list-style-type: none"> • Number and type of clients served • Number of people employed • Types of services provided • Number and type of community partners • Individual quotes or stories from clients, family members or community partners • Examples of care integration

When Should Your Story be Shared?

Since your stories are designed to support specific organizational goals, it is helpful to plan when the ideal time would be for your target audience(s) to hear your story. For example, you would want a legislator to hear about how important Medicaid funding is to your ability to serve clients as they are considering potential legislation that would impact Medicaid. Think of any major deadlines, special events or milestones for you or your target audience.

Where or How Can You Tell the Story?

A good story only has impact if it is shared. Share stories regularly with your staff, clients and community partners. Stay in touch with your legislators and their staff, keep them informed about updates and changes. Include stories everywhere: in marketing materials and newsletters, on your website and social media accounts or in letters to the editor. Do not rely just on words, use visuals, including photos and quotes.

How does your target audience get information? In what ways do you already communicate with this audience?

- | | |
|---|---|
| <ul style="list-style-type: none"> • Email • Phone calls • Newsletters • Media (press release, op-ed) • Social media | <ul style="list-style-type: none"> • Website • Blog • Video • Webinars • Virtual site visits |
|---|---|

<p>Need help drafting a letter to the editor or press release? Contact Communications@TheNationalCouncil.org</p>	<p>Want to set up a meeting with a legislator but aren't sure where to start? Contact Policy@TheNationalCouncil.org</p>
--	---

During your meetings, legislators will have a variety of reactions. The following examples provide some suggested responses to various comments. Also, don't forget to update the [National Council](#) on the outcome of any visits or meetings about federal legislation.

If your elected official says...

“This sounds great! I’ll sign on to everything!”

Thank them and let them know that you will be in touch to follow up. If possible, find out who their mental health/substance use, and/or health legislative assistant (LA) is for both their D.C. and local offices. Sometimes legislators agree to take specific actions but will forget if not prompted, so it is important to have the LA's contact information.

“I’m interested. Are there letters being circulated about this bill? What can I do?”

Thank them and refer to the immediate actions/requests that are listed on the fact sheets. Let them know that you will keep them posted on any future actions, such as signing on to a circulating letter. If possible, find out the name of the local staff person as well as the D.C. staff person to follow up.

“Sounds interesting. I’d like to learn more.”

Legislators, especially those recently elected, are often unwilling to make commitments the first couple times they are asked. This is in part because they simply cannot agree to everything that is asked of them and/or are eager to learn more about an issue before making a decision. If you get this reaction, thank them and let them know you're happy to serve as a resource. Find out the names of the appropriate staff people and follow up with them.

“I’ve always opposed federal funding for mental health and addictions issues.”

Be polite, but persistent. Let them know that while you disagree with them, you hope that the legislator or staff might be willing to take some time to learn more about the valuable services your group provides to the community – services that are an entirely appropriate and worthwhile investment of federal funds. If possible, find out the names of the local staff person as well as the D.C. staff person to follow up.

No matter how the conversation goes, be sure to follow up within a week with the appropriate staff person. Thank them for their time and provide any additional information you promised to share.





[TheNationalCouncil.org](https://www.thenationalcouncil.org)

