

Convene.  
Strategize.  
Activate.

# Advocacy 101

October 6, 2020

Ann Rodriguez, Assistant Director



CENTER *for*  
INTEGRATIVE  
HEALTH

insight to innovation

# A little about me and the izi Center for Integrative Health:

Ann Rodriguez  
Assistant Director of izi

Our mission is to foster **collaborative** and **evidence-based** initiatives for improving the quality and efficacy of the behavioral health, intellectual and developmental disabilities, and substance use care and support service systems within a comprehensive system of whole person care.

We accomplish this with three strategies:

- ◇ convening stakeholders
- ◇ strategizing solutions
- ◇ activating change

# What is Advocacy?

To advocate is to defend or promote a cause.  
Advocacy is *active*, not passive.

Advocacy goes beyond changing or shaping legislation or policy. The larger goal is systems change.

*Note: non-profit organizations have to be aware of advocating versus lobbying but both can be done.*



# Opportunity Knocks!

There are so many opportunities right now for you to be heard on big issues that impact children, youth and families, like:

- Funding and availability for community-based services
- Medicaid Transformation
- Early Childhood interventions
- Health Equity
- Value-Based Care

*You can become a resource for difficult decisions!*



CENTER *for*  
INTEGRATIVE  
HEALTH

insight to innovation

Convene.  
Strategize.  
Activate.

# Child and family involvement in advocacy efforts can have a huge impact!



# There are many places you can use your advocacy skills:

- With elected officials
- With policymakers



CENTER *for*  
INTEGRATIVE  
HEALTH

insight to innovation

Convene.  
Strategize.  
**Activate.**

# Elected Officials



# NC Legislative Sessions and Interims

- State budget runs in two-year cycles and each cycle is a biennium.
- The NC General Assembly has a session every year. The first year of the biennium is a “long session” and the second year is a “short session”.
- The beginning of a biennium is a fresh slate because all bills have to be introduced new—even if the issue has come up through bills in the past.
- The NCGA is not in session right now. They will come back for the long session on January 13, 2021.
- The long session begins the budget process for the next two years. In this next long session, they will develop the State budget for the State fiscal year that begins on July 1, 2021 as well as the State budget that begins on July 1, 2022.
- The long session is also when bills can be introduced and must meet some deadlines for consideration to stay alive in the next session.



# NC Legislative Sessions and Interims, cont'd:

- The next short session will begin in April or May of 2022.
- The State Fiscal Year budget that begins on July 1, 2022 was already developed in 2021 but then will be “tweaked” in the short session to account for any new information or circumstances.
- This past short session was different because the focus had to be on addressing COVID-19 and how to allocate the federal funding.
- Bills that were introduced in 2021 and met deadlines can be considered as well as certain other bills related to appropriations and special circumstances.

# NC Legislative Sessions and Interims, cont'd.:

- The time between sessions can also present great opportunities for advocacy!
- The interim can be used for Joint Legislative Oversight Committees and other special committees to meet. These committees will delve into issues and formulate recommendations that often are turned into legislation for the next session.
- Some key interim committees:
  - Joint Legislative Oversight Committee on Health and Human Services
  - Joint Legislative Oversight Committee on Medicaid and Health Choice
  - Joint Legislative Oversight Committee on Education
  - House Select Committee on COVID-19

# Get to Know Your Legislators and Policy Makers

- ***Relationships Matter!*** *Building a solid relationship with your Legislator or policy maker that is based on mutual respect and trust is crucial.*
- ***Grassroots Matter!*** *Advocacy starts at home.*
  - The simplicity of effective grassroots...
  - Educating the legislator/policy maker
  - Creating trust and offering assistance

# Do Your Homework and Create Your Messaging

- Identify your priorities
- Decide who are the key legislators/policy makers
- Create your message
- Get your message out

## Priority Example

“To influence and support legislative provisions that provide clear values and mechanisms for **children, youth, and family** involvement in policies, service structures and cross-system structures.”

# Identify Your Priorities as a Group: Key Words for Legislative Bill and Policy Searches

- *Appropriations*
  - *Child Mental Health*
  - *Mental Health*
  - *Social Services*
  - *Health Choice*
  - *Juvenile Justice*
  - *Health*
  - *Child Welfare*
  - *Welfare*
  - *Medicaid*
  - *Foster Care*
  - *Housing/Homelessness*
- These terms will help you select the legislative committees to focus on and the terms you use to search for bills.
  - In the legislative database, you can combine terms, e.g. child and mental health and appropriations to refine your search
  - For policies, search on the department website to capture items that cross divisions.

# Encouraging Your Constituents/Members to Advocate

- Pinpointing your priorities and goals helps to make advocacy less daunting.
- Help connect constituents with resources to keep updated, e.g. website links, links to legislation, links to rule and policy changes.
- Track on key legislation and policy issues that your organization has prioritized.
- Develop messaging constituents can use that focuses on the priorities. They can add their personal message at the same time as having a consistent message.
- Use the messaging to develop alerts, letters, fact sheets, newsletters.
- Use social media and tags to connect in a positive fashion.

# An example of advocating by correspondence:

The priority issue: Support continued funding for the grant-in-aid to support kids with learning differences who require alternative school settings.

Who should I contact?:

- Legislators in the NC General Assembly because they decide if this program is funded.
- Focus on legislators who sit on education and appropriations committees.

How should I contact them?

- Email
- Letter
- In-person visit
- Virtual visit



# Sample correspondence

Dear *name of legislator*:

I am the parent of a wonderful 18-year old senior in high school. My child has a learning difference that has made it necessary for her to learn in smaller classroom settings. I greatly appreciate that the legislature has provided grant-in-aid funding for families of children with learning differences. These children have more success in schools with smaller classroom sizes. I know you will be considering the budget this year so please continue your support for the funding of the [grant-in aid program for children with disabilities](#) because your support will help my child reach her potential as a student and later as an independent and successful adult.

I am happy to serve as a resource so please feel free to contact me if you have any further questions or comments about the **grant-in-aid program for children with disabilities**. Thank you for all of the great work that you do for North Carolina!

Name

Contact Info

# Meeting with an Elected Official

- Don't just show up! Contact the elected official to set up an appointment.
- The NC General Assembly website [ncleg.gov](http://ncleg.gov) has the member webpages under "[House](#)" or "[Senate](#)" with their contact info.
- Each legislator has a legislative aide who will assist you in getting an appointment set up in the means that works for you, e.g. in-person, phone call, virtual.
- Be on time but be prepared to wait. When the legislature is in session, things can be chaotic for legislators and they may not be on time.
- Have your message ready because you may have 15 minutes or less to make your point.

## Some additional tips:

- Present yourself and your views in a respectful, dignified manner.
- Take or provide written material and leave a card. Someone else is walking in while you are walking out. If you are meeting virtually, send the written material electronically prior to the meeting so you can share your screen and review it if there is time.
- Think before you react! If he or she says things that you don't agree with, keep a cool head and respond rationally, with facts. If you handle yourself well, you can begin to establish a working relationship. They'll recognize your name when you write or phone the next time. Building a base for continuing communication is important.
- Always say thank you for your time and follow up with an email that summarizes the meeting.

# An example of a meeting with a legislator:

- A group determines that they want to meet with a key legislator.
- They choose a limited number of representatives to attend.
- They decide that the message is to offer themselves as a resource to the legislator.
- One of the people contacts the legislative aide for that legislator and sets up a meeting.
- The group representatives decide on the materials that they will share and they collect them into a folder with contact information included.
- They also decide who will make what points.

# Meeting the Legislator:

- On the day of the meeting the group representatives meet at a designated location outside of the legislator's office.
- They proceed together to the legislator's office and check in.
- They wait until the legislative aide escorts them into the legislator's office.
- They begin with introductions and then begin to make their points to the legislator. They begin with who they are and what they do. They move to the main point that they are here as a resource.
- The legislator recounts a recent call she received from a constituent parent. The group representatives use this opportunity to provide a context for how they can serve as a resource in this situation.

You have made your point and had an opportunity to serve as a resource!  
Kudos!





CENTER *for*  
INTEGRATIVE  
HEALTH

insight to innovation

Convene.  
Strategize.  
**Activate.**

# State Policy Making

# Where are opportunities for impacting policy?

- Rules overseen by the Office of Administrative Hearings
  - NC DHHS
    - NC Commission on MH/DD/SAS
    - Physician Advisory Group
  - State Board of Education
  - Dept of Public Safety
- Clinical Coverage Policies for Medicaid
- Policy Initiatives
  - Concept Papers

## *A Rules Resource:*

*The NCGA website has [a link](#) to the North Carolina statutes and that will take you to the rules. Chapter 122C has all of the rules for MH/IDD/SUD services.*



## There are many ways to get involved:

- Serve on committees and work groups
- Put yourself on mailing lists, e.g. legislative committee subscriptions, notifications on rules
- Find go-to resources for updates and information
- Take advantage of free opportunities

Imagine if the youth and family voice was always a part of legislative and policy making?

# Powerful!



# The most important thing you can do to advocate as an individual right now?



Convene.  
Strategize.  
Activate.

# Resources are Available

[NC Collaborative for Children, Youth and Families](#)

[Foster Families Alliance of North Carolina](#)

[izi Center for Integrative Health](#)

[MomsRising.org](#)

[NC Child](#)

[Prevent Child Abuse North Carolina](#)



insight to innovation



CENTER *for*  
INTEGRATIVE  
HEALTH

insight to innovation

Convene.  
Strategize.  
**Activate.**

## To reach me:

Ann Rodriguez  
Assistant Director  
izi Center for Integrative Health  
[ann@izicenter.org](mailto:ann@izicenter.org)  
919-744-7937