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# Advocacy 201: Advocacy, Collaboration and Coalition Building

September 14, 2021

Ann Rodriguez, Executive Director



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

Ann Rodriguez  
Executive Director of izi

Policy Wonk by Career: Worked in US Senate, 27 years of policy analysis work in North Carolina, lobbyist for membership association

Advocate at Heart:

**Firm believer in the benefits of partnerships, collaboratives and coalitions!**

izi is a convening agency and we work within the behavioral health, intellectual and developmental disabilities, and substance use care and support service systems to progress a comprehensive system of whole person care. We accomplish this through convening, strategizing and activating change as well as through information sharing and advocacy building.

*"I always wondered why somebody doesn't do something about that. Then I realized I was somebody."*

**-Lily Tomlin**

# Agenda:

- Advocacy 101 Recap
- Definitions
- Advocacy, Building Community  
Collaboration and Coalitions
- Why Now?
- Resources



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# Advocacy 101 Recap

ad·vo·ca·cy

The act or process of  
supporting a cause or proposal.

# 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 finishing up the Long Session that began in January.
- The long session begins the budget process for the next two years. The NC General Assembly is in the process of developing the State budget for the State fiscal year that began on July 1, 2021 as well as the State budget that begins on July 1, 2022. The House and Senate have passed their separate versions and they are working on the compromise

# NC Legislative Sessions and Interims, cont'd:

- Then it will be up to the Governor to sign it into law, veto it, or not sign it or veto it and it will become law after 10 days (not including Sundays).
- The long session is also when bills can be introduced and must meet some deadlines for consideration to stay alive in the next session.
- 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.
- 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

# Where are opportunities for impacting policy?

- Rules overseen by the [Office of Administrative Hearings](#)
  - NC DHHS
    - [NC Commission on MH/DD/SAS](#)
    - [NC Physician Advisory Group](#)
  - [NC State Board of Education](#)
  - [NC Dept of Public Safety](#)
- [Clinical Coverage Policies for Medicaid](#)
- Policy Initiatives
  - [Concept Papers and all info for Medicaid Transformation](#)

## *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 like webinars, downloads of white papers

# Encouraging Your Constituents/Members to Advocate

- Determine your goal as an individual or organization.
- Create your messaging.
- Identify key legislators and policy leaders.
- Convey your message through meetings, emails, phone calls.

## ADVOCACY 201:

- Coalition and Collaboration to expand your capacity to advocate!

# Definitions

# col·lab·o·ra·tion

To work jointly with others or together especially in an intellectual endeavor.

# co·a·li·tion

A body formed by the coalescing of originally distinct elements.

# co·op·e·ti·tion

collaboration between business competitors, in the hope of mutually beneficial results



# Advocacy by Building Community Collaboration and Coalitions

*"Alone we can do so little;  
together we can do so much."*

- Helen Keller

# Advantages to Collaboration and Coalition Building

- Pool resources
- Broaden your network
- Share in the legwork
- Share strategies, experiences and connections
- Develop relationships that can be important for future issues
- Show your capacity to partner
- Increase respect and awareness of your organization and message

# Challenges to Collaboration and Coalition Building?

- Entails clarify about your bottom line. You may not get everything you want so you need to know what the most important things are to you and your organization.
- Necessitates a different kind of vetting and process within your organization to ensure your voice is representing your organization.
- Assumes your organization, and particularly the leadership, will support the final product/recommendations of the collaborative or coalition.
- Requires ongoing participation to ensure that your voice/position is heard and incorporated.
- Involves periodic evaluation to ensure that the collaboration and coalition is serving the right purpose.

# Ensuring Every Voice is Valued

- Thoughtfully consider the membership in a collaborative or coalition and the perspectives that are at the table. Is there a perspective that is important and hasn't been included in the past?
- Take time before getting into the policy substance to understand each perspective and the goals/objectives of each representative. What does each individual want to accomplish by participating?
- Consider options for compensating individuals who are willing to participate, but are not being compensated through an organization to do so.
- Provide resources and educational tools to level the knowledge base for all participants.
- Create an atmosphere and group expectation of “thinking outside the box” and going beyond historical ways of doing things.
- Periodically check-in with participants to ensure the collaborative/coalition is meeting their needs.

# An Example: Collaborative to Define the Value of Care Management for Consumers and Family Members

## Purpose of Collaborative:

- Create a representative group (collaborative) consisting of equal membership of BH/IDD and FQHC/CHC consumers and family members and include a sample of provider representatives who are prospective care managers.
- Ensure that each stakeholder involved in the collaboration is an equal partner in the discussion and formulation of recommendations.
- Define value in the care management role from the perspective of consumers, family members and providers.
- Examine how global pandemic, systemic bias, racial equity and SDoH impact the value proposition.
- Identify issues of priority and importance for consumers, family members and providers related to the care management role and provide resolutions/recommendations for these issues.

## Example, cont'd:

- Compensation for participation by consumers, family, persons with lived experience who are not affiliated with an organization. (We received donations from organizations and agreed to share all products in return)
- Interviews conducted first to determine personal goals of individuals.
- First meeting included a level-setting educational component.
- Group identified four areas of care management concept and role to focus on. Each meeting was focused on at least one of those four areas.
- There were no pre-conceived concepts of products. The collaborative determined the products that would be developed and they were decided through their conversation, e.g. questions list for consumers and families to engage the care manager, letter to NC DHHS Secretary about a health equity issue, agreed upon definition of health equity.



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# Why is this Important Now?



# Opportunity, Opportunity, Opportunity through Policy Shifts!

- Whole Child Care: System of Care, InCK Grant to coordinate services
- Medicaid/Health Choice Transformation: care management for some Standard Plan and all Tailored Plan children, multidisciplinary approach that includes Social Determinants of Health, value-based service delivery that balances quality and cost
- Families First Prevention and Services Act/NC Child Welfare Reform: shifting focus from higher levels of service to prevention and early intervention, planning for the Foster Care Specialty Plan that is compelling higher levels of coordination between social services and other agencies to serve children
- School-Based Mental Health Initiative: Regional networking to strengthen coordination and communication among human service agencies serving students, infusion of funding to increase counseling and behavioral health supports in school units

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# Resources are Available for Collaboration and Coalition Building

[PCI: Resource Guide for Building Effective Collaboration and Integrated Programming](#)

[National Council of NonProfits: 5 Tips for Nonprofit Collaboration](#)

[Stanford Social Innovation Review: Collective Impact](#)

[Utah State University Center for Persons with Disabilities: Evidence-based Practices for Coalition Building](#)



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# Organizations Ready to Partner

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

[Prevent Child Abuse North Carolina](#)

[Foster Families Alliance of North Carolina](#)

[izi Center for Integrative Health](#)

[MomsRising.org](#)

[NC Child](#)



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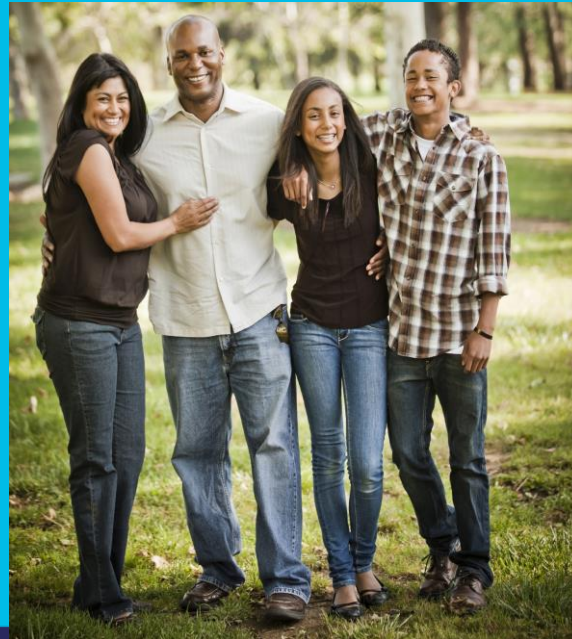


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# Child and family involvement in advocacy efforts can have a huge impact!



# izi Center for Integrative Health 2021 Conference



The banner features a dark blue background with a sunset scene. On the left, there are two large overlapping circles: a yellow one on the left and an orange one on the right. A white circle is positioned in the center, overlapping both. Inside this white circle is the 'izi' logo and the text 'CENTER for INTEGRATIVE HEALTH' and 'Insight to Innovation'. To the right of the circles, the text 'Opportunity & Optimism' is written in large white font, with 'BUILDING BRIDGES TO TOMORROW' in smaller white font below it. Further down, 'Conference & Exhibition' is written in white, followed by 'Hybrid Event Live & Virtual' in orange. At the bottom, 'December 8-10, 2021' and 'Pinehurst Resort, Pinehurst, NC' are written in white.

**Opportunity & Optimism**  
BUILDING BRIDGES TO TOMORROW

**Conference & Exhibition**  
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Pinehurst Resort, Pinehurst, NC



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