

# A Handbook for Advocates

**"If not us, who? If not now, when?"**  
-Hillel the Elder



**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, don't 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.

## 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 or in-person
3. Attend upcoming community events or town halls, or invite your legislator to visit your agency

## 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. Join the Network or get more information at [www.thenationalcouncil.org/policy-action/ambassador-network/](http://www.thenationalcouncil.org/policy-action/ambassador-network/)

## How to Use this Handbook

The handbook is designed so that you may begin anywhere and use some or all of the suggestions. You can read through the entire toolkit 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 toolkit and disseminate among your legislators or clients. While the toolkit and resources were developed with federal advocacy in mind, you may find many of the tips and tools useful in your state advocacy.

## Table of Contents

- I. Effective Advocacy: Do Your Homework
- II. It's Not Just One Meeting: Build Relationships with Legislators
- III. Emails, Calls, Snail Mail: Stay in Contact with Legislators
- IV. Who You Are, What You Do: Introduce Your Organization
- V. The Golden Ticket: Tips for Effective Meetings with Legislators
- VI. In the District: Stay Connected to Legislators in Their Communities
- VII. A Strong Team: Recruit Allies to Help Make the Case
- VIII. Resources and Templates
  - a. Helpful Congressional Information
  - b. Legislator Staff Chart
  - c. Introducing Your Organization: a Template
  - d. Requesting a Meeting: a Template
  - e. Requesting a Site Visit: a Template
  - f. Meeting Follow-up: a Template
  - g. Crafting a Compelling Story
  - h. What to Do When Your Legislator Says

## 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 you ensure your message is heard.

### Know What Matters

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 the right policy choices to make.

#### **What Motivates Legislators:**

- ✓ Compelling **personal stories** told by constituents. These provide an emotional hook and an engaging way for them to talk about the issue with their colleagues and the press. See [Crafting a Compelling Story](#) for a template for how to do this.
- ✓ 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** 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's Not Just One Meeting](#) for tips on building relationships.

### Know Your Legislator

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'll be meeting. **Check legislators' official and campaign websites for important information:**

- ✓ **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?
- ✓ **Leadership assignments:** Are they an influential leader in their party?
- ✓ **Issue interests:** Do they care deeply about healthcare?

Knowing where your legislator stands will help you talk about behavioral health in terms that are most likely to resonate. **Learn something about his or her views on key issues.**

- ✓ Is he or she a long-time supporter of mental health and substance use issues?
- ✓ Does he or she 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?
- ✓ Has he or she championed senior citizen issues?

You can also check [www.congress.gov](http://www.congress.gov) to see what bills they have cosponsored. Or, email [Communications@TheNationalCouncil.org](mailto:Communications@TheNationalCouncil.org) to find out if we've worked with that legislator on behavioral health issues before.

**Remember**, just because your recommendation is a good public policy, that isn't always sufficient to win a legislator's support. They need to know that it's **important to large numbers of voters**, to the **wellbeing 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 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’ll be asking the legislator to do
- ✓ 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
- ✓ Know the arguments for and against the issues you want to discuss
- ✓ Address objections your opponents are likely to raise
- ✓ 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 his or her staff.

- ✓ Each U.S. Senator has perhaps 2-3 dozen staff members; each Representative has 12-15. Included in the resource section is a [helpful chart](#).
- ✓ 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. Refer to the [resource section](#) for a list of important committees.
- ✓ Don't be concerned if you meet with staff instead of the legislators themselves.
- ✓ When reaching out to staff about policy issues, always begin with the Legislative Assistant (LA) for that issue. For mental health and addiction, 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's 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 back home, when they are less distracted by the business of Congress. Visit your Senator or Representative to get to know them better and educate them about mental health and addiction issues in the 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 don't seem to care about mental health and addiction policy, it doesn't mean you should ignore them. Rather, you need to make more of an effort to educate and influence them about the importance of your issues. But you don't 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 healthcare or who has an important leadership or committee position. The [National Council staff](#) can help you determine who these legislators are.

### **Ten 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. Refer to the [In the District Section](#) for tips on site visits.
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. Refer to the [In the District Section](#) for tips on site visits.
4. **Establish yourself as a helpful expert** that 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 he or she supports 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're 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. If you wish to **personally host a fundraiser**, work with the legislator's campaign staff—not their Senate or House staff—on the details. Remember that if you are hosting a fundraiser, it must be in your role as a private citizen, not a representative of your organization.
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 outsize influence in tipping the scales. The [National Council](#) will give you the tools and help you need to build these relationships.

**Stay in touch.** Don't wait until you need something from your legislators to communicate with them. Let staff know if you or your organization featured in a recent news story or share a new report that highlights how a particular policy might affect your community. But be judicious! Don't be the person who is clogging staff inboxes.

## Emails, Calls, Snail Mail: Stay in Contact with Legislators

Because of enhanced security and screening measures, USPS mail sent to the capital can be delayed for days or weeks. 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 that have contacted them for or against that issue.

The volume of e-mail 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 e-mail is the "from" line.

### Tips for writing to your legislators:

- If you know the name of the staff person responsible for behavioral health issues, address the e-mail to him or her personally. If not, send the letter 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 e-mail. 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 him 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 with your legislator the number of people in their district who will be affected and how by the proposal under consideration.
  - 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 don't receive a written reply or telephone response to your e-mail or letter within a month or so – e-mail or write again and enclose your original message.
  - Once you get a reply, be sure to thank the person who sends it to you and commit to remaining in touch with her or him.
  - If you receive a response with which you disagree, e-mail or write your legislator again and politely commit to remaining in touch on this important issue.
  - If you get a form letter back that doesn't address the concerns you raised, don't be discouraged. Seek out staff to meet with in DC or in the district to talk about your organization's work and share how the policies you raised would affect your clients. Relationship building takes time!

## 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, DC 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. 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 DC legislative offices can be reached through the US Capitol switchboard at (202) 224-3121. If you want to get a hold of 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; instead, 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 him or her.
- **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 and Facebook pages. You should "like" their page on Facebook 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 more importantly 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. In this way, 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.



## 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's 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 as 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're passionate about mental health or addiction. You don't 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 of the items below 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 impact does your work have on people's health or lives? For example, reduced hospitalizations, increased employment, etc.
- ✓ Is your organization locally governed? How does it meet local needs?
- ✓ Are there any board members the legislator might know?
- ✓ 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?
- ✓ Do you have anything in common with the legislator- went to the same school, from the same hometown, have mutual friends, etc.?
- ✓ Is there anything the legislator has done in the past that was especially helpful to you or your organization?

**Remember** *you don't have to give a lecture when you're introducing yourself* – you'll 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. Don't 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. 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 the Resource, [Introducing Your Organization](#) for a template to develop one.

# 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. Don't be intimidated, your representatives want to hear from their constituents and those who serve them.

## 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 his/her website three or four weeks in advance. If at all 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. Effective Advocacy for important information to 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.
- Don't hesitate to meet with staff if the elected official is unavailable.
- Show up ten 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.
- Don't forget to ask for something concrete. For example, "Please sign on as a cosponsor to H.R. 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 aren't sure of the answer, tell them that you will find it and get back to them. Never provide inaccurate or false information.
- Leave them brief information on your organization and the issues you are discussing. One-pagers with bullet points are best—staff don't 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.

## 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 weren't able to send them before the meeting.

***Feedback on the results of your visits and correspondence is of tremendous value to National Council staff in 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 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. Sometimes, the meeting might be devoted to a particular issue, such as during the summer of 2009 when legislators around the country held town hall meetings on health reform.

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.

#### **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 invite 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 the section on [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 Community Event

Organizing a community event with your legislator can be time consuming, but is valuable in establishing or strengthening your 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.

## 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

When you're thinking about what groups to engage in advocacy around a particular issue, get creative! Sometimes, it's 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 services.

## 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's often helpful if you have the flexibility to make minor adjustments so as to accommodate others. Even if you can't change your course of action, at least you've 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'd like to collaborate.** Maybe that group doesn't 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.

## Start Anywhere

Don't feel intimidated by advocacy, you are prepared to effectively communicate your concerns, opinions, and needs with your legislators. Remember they are public servants, and they 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 addiction 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 [Communications@TheNationalCouncil.org](mailto:Communications@TheNationalCouncil.org).

### Helpful Resources:

- National Council website (<https://www.thenationalcouncil.org/policy-action/>)
- U.S. House of Representatives website (<http://www.house.gov/>)
- U.S. Senate website (<http://www.senate.gov/>)
- Congressional Management Foundation (<http://www.congressfoundation.org/>)

## Resources and Templates

- a. Helpful Congressional Information
- b. Legislator Staff Chart
- c. Introducing Your Organization: a Template
- d. Requesting a Meeting: a Template
- e. Meeting Follow-up: a Template
- f. Requesting a Site Visit: a Template
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## Helpful Congressional Info

The pace of a 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 his 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's 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 below 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. As just one example, funding for the Primary Care-Behavioral Health Integration program goes through the Appropriations Committee before becoming available. Website: <http://www.appropriations.senate.gov/>

#### Senate Finance Committee

This committee handles a number of issues related 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 has to come through this committee. Website: <http://www.finance.senate.gov/>

#### Senate Health, Education, Labor & 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. Website: <http://www.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. Website: <http://appropriations.house.gov/>

#### House Energy & 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. Website: <http://energycommerce.house.gov/>

#### House Ways & 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. <http://waysandmeans.house.gov/>

#### House Committee on Education & the Workforce

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. Website: <http://edworkforce.house.gov/>



## Legislator Staff Chart

Use this chart to record the key staff for your senator or representative.

Senator or Representative:					
Staff Title	Staff Role	Name	Contact Info	Policy Area	Notes
<b>Chief of Staff (COS)</b>	Most senior staff member and advisor to the legislator				
<b>Legislative Director (LD)</b>	Oversees the legislative staff and works with COS and legislator to make policy decisions				
<b>Legislative Assistant (LA)</b>  <b>*usually more than one</b>	Monitor and analyze specific legislation and make recommendations to legislator; responsible for several policy areas; also frequently meet with constituents regarding issues in their area			Health	
<b>Scheduler</b>	Responsible for scheduling meetings				
<b>State or District Director</b>	Can help coordinate site-visits and in-person meetings in the district				
<b>Press Secretary</b>	Key contact for media activity				

## Introducing Your Organization - template

### 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 mental 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, etc.)
  - 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.) Don't 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 layman's terms to explain not just what services you provide, but what impact they make in clients' lives.

## Requesting a Meeting - template

**[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 of]** staff who serve **[Insert number of]** 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, then 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.]**

We look forward to the opportunity to meet with you in person to share information about our innovative programs that help our clients live independent, productive lives and keep our communities safe and strong. I am able to be flexible for both the time and place of the meeting, based on your schedule. We would be happy to schedule a meeting at your DC office or at your local office if that would be more convenient. I will follow-up with your scheduler in a few days to discuss further. In the meantime, should you have any questions or if I can be of service, please don't hesitate to contact me at your convenience **[Your phone number & email address]**.

Sincerely,

**[Name]**

**[Organization Name]**

## Site Visit Request - template

**[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 invite you and your staff to **[Name of Organization]** as your schedule permits. Our Board of Directors, clients and staff are excited to give you a tour of the organization and share information with you about the services we provide to the **[Your Organization's Service Area]** community. **[Name of Organization]** employs **[Insert number]** staff who serve **[Insert number of]** 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, then 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.]**

We would appreciate an opportunity to share information with you about our innovative programs that help our clients live independent, productive lives and keep our communities safe and strong. My staff and I look forward to the opportunity to host you and your staff at **[Name of Organization]** and are willing to be flexible, based on your schedule. I will follow-up with your scheduler in a few days to discuss further. In the meantime, should you have any questions or if I can be of service, please don't hesitate to contact me at your convenience **[Your phone number & email address]**.

Sincerely,

**[Name]**

**[Organization Name]**

## 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 are the most important part of the conversation. They get to the “why we exist” question, engage the audience and help people remember the program details you slip into the story the way you slide spinach into your lasagna without the kids knowing.

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

### Who Is Your Storyteller?

- Your organization's staff
- Your organization's board or members
- Consultants
- Clients
- Other (describe)

### Who Is Your Audience?

- Clients or potential clients
- Your organization's staff
- Other health care providers
- Media
- Policymakers or legislators
- Funders and potential funders
- Your organization's board
- Other (describe)

### How Do You Want Your Story to Move Your Audience to Action?

- Seek your services
- Recognize you/your staff as experts on the topic
- Become members
- Consider funding future initiatives
- Advocate for a policy change
- Take another action related to your organizational goals

### 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'd 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 other key audiences. Include stories everywhere: in marketing materials and newsletters, on your website and social media accounts, or in letters to the editor. Don't rely just on words, use visuals, including photos, quotes and memes.

How does your target audience get information? In what ways do you already communicate with this audience? Check all that apply.

- Print — direct mail
- Presentation
- Email
- Newsletters
- Media (press release, op ed)
- Website
- Social Media
- Blog
- Video
- Webinars
- Special organizational events

### How Does this Story Relate to Your Work/Others?

What other organizational initiatives or timely topics does your story touch upon?

### Think outside the box:

Could your storyteller be a sheriff?

A teacher? A corrections officer?

Different storytellers may resonate more deeply with different audiences.

## What to Do When a Legislator Says...

During your meetings, legislators will have a variety of reactions. The examples below provide some suggested responses to various comments. Also, don't forget to update the [National Council](#) to 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'll be in touch to follow up. If possible, find out who their mental health/addictions, and/or health legislative assistant (LA) is for both their DC and local offices. Sometimes legislators agree to take specific actions but will forget if not prompted, so it's important to have these 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 DC 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 name 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 name of the local staff person as well as the DC staff person to follow up.