



BE THE CHANGE YOU WANT TO SEE...

ADVOCACY 101

Board of Directors Training
March 27, 2024

What you need to know!

- ▶ What is advocacy, and why is it necessary?
- ▶ What is advocacy vs. lobbying?
- ▶ What are the laws and regulations around advocacy and our agency?
- ▶ Who makes the most effective advocate?
- ▶ How to develop an advocacy strategy?
 - ▶ Determining your issue
 - ▶ Identifying your targets
 - ▶ Messaging & tactics
- ▶ Was it effective?
 - ▶ Evaluation & follow-up



What is **Advocacy**?

Advocacy is a general term that can be simply supporting a cause, policy, or speaking up for something you believe in.

- ▶ Raising awareness
- ▶ Educating policymakers
- ▶ Helping to develop new policies—policy insights



Policy Advocacy

- **Policy practice:** efforts to change policies by establishing new policies, improving existing ones, or defeating policy initiatives.
- **Policy advocacy:** policy practice aimed at helping powerless, vulnerable populations improve their living situations, access to resources, and increase their opportunities
 - Social workers' policy practice is considered policy advocacy because we work with vulnerable populations



Advocacy vs. Lobbying

Lobbying is a type advocacy that involves directly influencing a legislator(s) to support or oppose a specific piece of legislation and/or funding.

- ▶ Lobbying can include working with legislators, legislative employees, or other government employees.
- ▶ Non-profits **cannot** participate in political campaigns in any form nor provide support for a particular candidate/political party.



Lobbying vs. Grassroots Lobbying

Grassroots lobbying: Asking the *general public* to contact their legislator and/or mobilizing the public around a legislative issue.

- ▶ Non-profits generally **not allowed** to lobby.
- ▶ Must register with NYS to lobby-disclosure of lobbying activities and expenditures.
- ▶ Federal funds **cannot** be used for lobbying.



Applicable Laws & Regulations

- ▶ NYS Non-Profit Revitalization Act (NPRA), 2013
- ▶ The Hatch Act, 1939
- ▶ NYS Lobbying Act, 2022
- ▶ Federal Lobbying Law, 1976
- ▶ Lobbying Disclosure Act (LDA)
- ▶ Internal Revenue Service (IRS)
- ▶ Program-specific standards & regulations



Why is Advocacy necessary?

- To protect interests of agency & families served
 - By extension, interests of communities served & key stakeholders.
- To educate and provide public awareness
 - Prevention
 - Civic awareness
- To promote a cause via public/private events
- Turbulent political times—funding threats



Who makes the most effective advocate?

- ▶ Those who share a personal connection with the issue – community stakeholders
- ▶ Those who could be impacted by the issue
- ▶ Anyone who wants to make a difference



Where to start?

1. Deciding whether to advocate for a policy
 - Ethics and analysis used to determine if a policy needs advocacy and whether the context will allow an intervention
2. Deciding on where to focus
 - Decision made where to focus change/intervention
 - Getting decision makers' attention
 - Checking if the context is open enough for an initiative
3. Developing a support base
 - Networks, coalitions, organizations



Framing the Issue

- You must analyze the problem and decide what kind of solution is obtainable; this could be either short or long term
- You must frame the issue in a way that will gain the most support; practice **positive spin**



Be the Subject Expert!

- ▶ To effectively present your issue, you must have knowledge of both sides of discussion; if there wasn't an opposing view, there wouldn't be a problem
- ▶ Obtain credible information
- ▶ Obtain public perceptions



Establish the GOAL

- ▶ Without a clear, obtainable goal your advocacy will lack purpose, direction, and the intended outcome
- ▶ Long-term vs. Short-term Goal
 - ▶ A long-term goal is one you eventually hope to obtain and usually has many factors to address
 - ▶ A short-term goal has a more immediate resolution and may be one step in advancing a longer-termed goal



Effective Issues...

- ▶ Are easy to understand
- ▶ Have a clear target
- ▶ Are non-divisive
- ▶ Result in meaningful life improvements
- ▶ Instill a sense of power to the powerless
- ▶ Are broadly and deeply felt
- ▶ Are winnable



Messaging should be...

- ▶ Easy to understand
 - ▶ Plain English
- ▶ Accurate and factual
 - ▶ Reliable, primary sources
- ▶ Consistent
 - ▶ Among all messengers
- ▶ Tailored to the interest of your intended target
 - ▶ Creates common ground and confirms their values
- ▶ Concise and to the point
 - ▶ *Talking points!*
 - ▶ Makes it easy to remember and repeat



Targets should include...

- ▶ Elected officials
 - ▶ Federal, state, and local government
- ▶ Organizations
 - ▶ Religious, civic, public and/or private
- ▶ Media outlets
 - ▶ Television, radio, print, internet
- ▶ Anyone who'll listen
 - ▶ Friends, family, teammates, co-workers



Tactics may include...

- ▶ Face-to-face meetings
 - ▶ Appointments with officials
 - ▶ Rallies and townhall
 - ▶ PTA, board meetings, and organization days
- ▶ Internet
 - ▶ Emails
 - ▶ Blogs/Twitter
 - ▶ Facebook, Instagram, TikTok, etc.
- ▶ Phone calls
- ▶ Writing campaigns
 - ▶ Letters and postcards
 - ▶ Petitions
 - ▶ Editorials
- ▶ Media coverage



Evaluation

- ▶ How effective were the messaging and tactics?
 - ▶ Were you able to explain the issue in simple terms?
 - ▶ Were you able to provide a factual counter arguments?
 - ▶ Were unanswered questions investigated and followed-up promptly?
 - ▶ Did tactics provide consistent and impactful visibility?
- ▶ What responses were received?
 - ▶ Were responses mostly supportive or confrontational; objective or subjective?
 - ▶ Could a change in strategy produce more positive results?
- ▶ Did messaging and tactics produce the intended resolution?
 - ▶ Were opponents persuaded and allies empowered?
 - ▶ Was short-term or long-term goal achieved?
 - ▶ Have networks of future supporters been established?



Post-advocacy follow-up

- ▶ **Thank you** letters, emails, and phone calls
- ▶ A debriefing with participants to discuss successes and failures for future reference; what worked/what didn't and why
- ▶ Establishment of new networks of legislative and advocacy supporters
- ▶ A vehicle or platform that keeps you and your supporters connected to the issue and future developments



Advocacy Work is a Marathon, Not a Race!

- ▶ When you become frustrated or discouraged, always ask yourself...

If not you, then who?

If not now, then when?

You are the change you want to see!



Resources

- ▶ United States, Congress, OFFICE OF THE NEW YORK STATE ATTORNEY GENERAL. *Guidance for Tax-Exempt Organizations on Political Activity and Lobbying*, October, New York State, 2020.
- ▶ Center for Lobbying in the Public Interest (2012). Retrieved from: <http://www.clpi.org/>.
- ▶ Deborah Riddick JD RN, DR. (2025, February 4), *Advocacy 101*, Policy & Planning, Community Health Alliance of Michigan. <https://www.Michigan.gov>
- ▶ Roseanna McCleary PhD, RM. (2025, February 4), *Policy Advocacy & Integrated Behavioral Care*, SAMHSA-HRSA Center for Integrated Health Solutions.

