

Advocacy Skill Building for Association Professionals

Blanca Campos, MPA
Vice President of Policy and Government Affairs



Sharmila Sandhu, JD
Vice President of Regulatory Affairs



Who We Are...

Community Behavioral Healthcare Association

The Community Behavioral Healthcare Association of Illinois (CBHA) is a statewide not-for-profit membership organization representing the interests of community behavioral health care agencies providing mental health, substance use treatment and prevention services to children, adults, and families in the state of Illinois.

The Association and its members are active participants in shaping the direction of Illinois' behavioral healthcare system. This active approach promotes quality behavioral healthcare services that can effectively and efficiently serve individuals and families living in communities throughout the state.

CBHA is governed by an 11-member board of directors that are elected from the four geographic regions of Illinois (Northeast, Northwest, Southern and Central). In addition to the board of directors, the association's leadership consists of the chairs of four standing committees: Public Policy; Integrated Primary and Behavioral Health; Children & Adolescents; and Behavioral Health.

Who We Are...

American Occupational Therapy Association

The American Occupational Therapy Association (AOTA) is the national professional organization representing the interests of more than 213,000 occupational therapists, occupational therapy assistants, and students of occupational therapy. The science-driven evidence-based practice of occupational therapy enables people of all ages to live life to its fullest by promoting health and minimizing the functional effects of illness, injury, and disability.

Occupational therapy practitioners are professionals who work with clients across the life span and in many health care settings (hospitals, nursing homes, rehab facilities, home health care, outpatient clinics), school systems, and industries.

Definition of Advocacy

Advocacy is an activity by an individual or group that aims to influence decisions within political, economic, and social systems and institutions. Advocacy includes activities and publications to influence public policy, laws and budgets by using facts, their relationships, the media, and messaging to educate government officials and the public.

Advocacy in action

As an advocate, your job is to connect, persuade, and educate. This is the case whether you are connecting in person, on the phone, in a letter, or by email.

Government officials can't be experts on every issue. Most will appreciate the knowledge that you bring to the subject and your interest in creating awareness.

Government officials do pay attention to their constituents. They want to know what matters to you, and they want to serve the interest of the voters in their district.

A paved road stretches into the distance under a dramatic, cloudy sky. The road is flanked by dry, brownish hills and sparse vegetation. The sky is filled with dark, heavy clouds, suggesting an approaching storm or a dramatic sunset. The overall mood is one of anticipation and challenge.

**THIS IS THE FIRST MILE IN A
LARGER JOURNEY...**

Getting to know a government official

- Read about your government officials: What are their backgrounds? What issues are they passionate about?
- If they recently passed a piece of legislation you can support, take the time to congratulate them. They will appreciate your support.
- Get your name on their mailing list or follow them on social media.
- Find occasions to see your government official in appropriate circumstances. For example, attend a Town Hall meeting or listening sessions with constituents.
- Invite them to visit your organization so that he/she may see firsthand how funding, or a policy affects day-to-day operations and the difference it makes or simply to introduce them to your work.
- Stay in Touch: Once you start developing a relationship with your government officials, it's critical that you work to maintain the relationship and stay in touch with them. Email or call them occasionally, update them on the issues and thank them when you can.
- Be a resource: Offer yourself as a resource for issues related to your industry. Eventually, you may even find government officials coming to you for information, help, or your point of view.

A top-down view of a desk with various office supplies. In the bottom right corner, a portion of a silver laptop keyboard is visible, showing keys for F1 through F8, and letters W, D, C, V, F, G, Y, U, T, R, E, and N. A gold ballpoint pen lies diagonally across the center. To its left is a pink pen with gold accents. Above the gold pen is its matching gold cap. In the bottom left corner, two gold paperclips are stacked. The background is a plain, light-colored surface.

Stay Informed, Take Action!

Preparing for a visit with a government official

- The best way to educate or influence government officials is to meet with them personally. Such visits are also a good way to introduce yourself as a constituent. You can do this individually or with a group.
- Schedule a visit with your government officials by simply calling their office or via email. When calling the office to request an appointment, ask to speak with the scheduler, explain the purpose of your call, and state the reason for the meeting. Know your availability before making the request.
- Do your research. If you're meeting with your legislator, read their bio, recent press releases, information about their district.
- If you are discussing a specific issue in person, try to be concise, well-organized, and mindful of their time. Share meeting material in advance and bring copies to share with meeting attendees. Providing materials in advance prepares those you'll be meeting with and serves as a valuable reference after the meeting.
- You might also choose to contact your government officials by phone, letter, or email. Remember to be brief, to the point, and courteous.

Do's of Advocacy

Do's

- Make an appointment whenever possible and call if you are running late.
- Be flexible and understanding if your meeting is cancelled, delayed or ends up being with a staff member instead.
- Identify yourself and the organization you are with each time you call or meet with your government official.
- Be courteous, well-organized, and prepared.
- Plan your purpose: What should your meeting accomplish? How are you going to support your issue? Think this through and do any necessary research and preparation.
- If attending in a group, coordinate who will be speaking on a specific issue and in what order. Consider sharing personal stories as it often gives credibility and a face to the issue being addressed.
- Ask for what you want and be clear about the action you are requesting (i.e. Co-sponsor and vote for bill X).
- End your appointment by thanking them for their time and support. Thank their staff for their help in setting up the meeting.
- Send a thank you note or email after the meeting and enclose answers to unanswered questions you might have had during your meeting.

**TELL YOUR
ASSOCIATION'S
“STORY”**



Adding Value

Don'ts of Advocacy

Don'ts

- Be argumentative, condescending, or threatening.
- Overwhelm them with too much data. Focus on one or two issues.
- Don't make up answers. Say you do not know and get back later with the correct information.
- Don't take more time than you were offered.
- Don't burn bridges. Leave the door open for further discussion, on these and other issues.



**BUILD YOUR
ADVOCACY TOOLS &
RESOURCES**

Advocacy & Policy

Congressional Affairs

AOTPAC

Federal Regulatory Affairs

Health Care Reform Implementation

State Policy



<https://www.aota.org/Advocacy-Policy.aspx>

Federal and state legislative issues affect you—where you practice, what you are paid, whether you practice at all. It's your profession, your future...so read, understand, and take action. Use this information to help you protect your profession and your future.

Watch videos on:

- How we protect the profession and secure your future (2 minutes)
- What we do and hear about the issues we address (1 hour)



AFRICAN SOCIETY
OF ASSOCIATION
EXECUTIVES

Thank you!

Advocacy is an ongoing process of building critical mass and turning passive support into real action. Together, we can work to enact change to address challenges impacting non-profits.

Questions?

Blanca Campos: bcampos@cbha.net

Sharmila Sandhu: ssandhu@aota.org