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Overview

This manual is intended to provide you step-by-step tools to creating an advocacy agenda for your school health center. You can use this tool kit with staff or as an exercise with your advisory board. The more people you involve in the process the more effective you can be. Remember to work in conjunction with your sponsoring agency's public relations or government relations department. Anyone can be an advocate for school health centers. This tool kit outlines advocacy in five key steps:

1. Identify Your Priorities/Needs
2. Choose Your Targeted Decision Maker(s)
3. Identify Your Allies & Stakeholders
4. Choose Your Strategy
5. Develop Your Message
6. Select Your Messengers
7. Create a Timeline

Advocacy is all about relationships and you have something of real value to bring to the relationship.

Sources: National Assembly for School-Based Health Care and the Illinois Arts Alliance Foundation

1. Know Your Community

Before you begin developing your advocacy plan take a few minutes to define your community. Who are the lawmakers for the SHC and provider? Who are the leaders in the community? In the school? This exercise can help to identify your decision makers, allies and opponents. Use the following worksheets as a guide.

Your Lawmakers

Advocacy is an ongoing process of building familiarity and trust between an elected official and an informed citizen—you. The first time your elected officials hear from you should not be when you have a problem or grievance. And you should not wait for the next “crisis” to get in touch with your legislators. Your elected officials want to see themselves as partners with their constituents—and especially within the world of non-profit organizations, where many social services are developed and delivered.

RESOURCES:

State General Assembly: www.legis.state.il.us.gov

U.S. Senate: www.senate.gov

U.S. House: www.house.gov

City/County: www200.state.il.us/government

List the elected officials that represent your:

<u>SHC</u>	<u>Healthcare Provider</u>
Councilman/Alderman:	
Mayor/City Manager:	
State Representative:	
State Senator:	
U.S. Representative:	
U.S. Senators:	
Other Lawmakers:	

Your Community

Your SHC Advisory Board can provide guidance, support, resources and knowledge to your SHC. Also, the advisory board can be your strongest advocate.

SHC Advisory Board:

Some community leaders may be on your board but there may be others that are important in the SHC's community. List them below.

Social Service Agencies:

Health Agencies:

Chamber of Commerce:

Charitable Organizations:

Religious Organizations:

Others:

Funders are important components of your community as well. You may have several current funders and others that are potential funders. List them below.

Provider:

Local Health Department:

Other Funders:

Potential Funders:

Your School Leaders

School District/Region: _____

Students: _____

Parents: _____

Principal: _____

Teachers: _____

School Nurse: _____

Guidance Counselors/Social Workers: _____

Superintendent: _____

School board/council: _____

Your Key Allies and Constituents

Advocacy efforts are most successful when done in conjunction with a broad range of people affected by the issue. ICSHC reaches out to other advocacy and community groups who care about school health. At a local level, school health centers should identify the community leaders who are willing to partner with them as they ask for in-kind services, funding, policy changes and general support to accomplish the center's goals. From the lawmakers, community and school leaders sections list below those that would partner with you to advocate for the school health center. Also list those that you would like to build a relationship with in the future.

Current Partners: _____

Future Partners: _____

2. Identify Your Key Priorities & Decision Makers

Local, state and federal laws affect how school health centers function. In addition, funding initiatives from local, state and federal agencies can be used to provide operating funds. ICSHC develops an advocacy agenda every year that identifies specific policies and/or funding initiatives where we will focus our advocacy efforts. Individual school health centers can participate in those efforts and in addition can create an advocacy agenda that is specific to the needs of their center. Below list 3 priorities for your school health center and the decision maker(s) that have the power to full-fill that need.

Example: ICSHC Priority—To ensure state funding for school health centers to maintain and expand services and centers. Targeted decision maker—Illinois General Assembly

PRIORITY	TARGETED DECISION MAKER

3. Create Your Strategies

In order to have an effective advocacy strategy you need to do a little research.

1. Targeted decision maker(s)
 - a. What have they done in the past on this issue (support/oppose)?
 - b. Who influences them?
 - c. Do you or any key partners have a relationship with them?

2. Develop your plan
 - a. What resources do you have to work with?
 - b. Who are your allies? Opponents? Is there already a coordinated effort working towards the same goal?
 - c. How will you deliver your message to your targeted decision maker(s)?
 - d. Does your plan mesh with your sponsoring agency's position and public relations plan?

3. Create a timeline and implement it!

Once you've done your homework, you're ready to put the pieces together!

5. Crafting Your Message

Decision makers come to depend on succinct messages. In the real world, even the most complex decisions come down to yea-or-nay votes, and profound deliberations often turn on simply-phrased statements of policy and principle. An important rule of thumb is to ignore rates and focus instead on incidents or anecdotes. Putting a face on the issues makes it harder for people in power to say no to the general community. Create a personal connection that relates to the lives of elected officials.

While your targeted decision maker will be your primary audience, you will have multiple audiences. For example, students who use the center, school personnel, community members, parents, and lawmakers. It is important to identify your real audience. Who makes the ultimate decision for what you need? The secondary audience hears everything you're doing, but your message is directed primarily to a few key individuals. Remember, that with limited resources you can't expend them trying to reach everyone.

Example: ICSHC message--School Health Centers provide primary and preventive health care services to students while reducing lost school time, removing financial barriers to care and promoting family involvement.

What is your message?

6. Identify Your Messengers

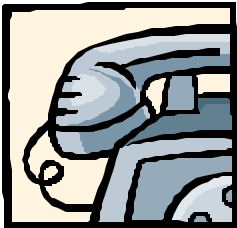
Who delivers your message is just as important as the message itself. Your messenger must be credible to the people making the decision. Decision makers will attribute great clout, credibility, and responsiveness to certain messengers. Identify those supporters who have political sway and engage them in your advocacy plan. Remember, elected officials will ultimately want to hear from their constituents—don't forget parents and students can be a powerful resource.

Who are your messengers?

National School Health Center Awareness Month

Tips for Delivering Your Message

There are many different ways and opportunities to get your message across to decision makers. When you get the chance to speak to a decision maker remember to internalize the message—make it your own—and that you personalize the examples, statistics and key points as much as possible. The next sections will walk you through different strategies of delivering your message to decision makers. Phone calls, letters, meetings, SHC visits, promotional materials and the media are all ways to reach out to any audience. The examples will focus on lawmakers but the skills and steps can be used for any targeted decision maker. **Use the sample projects in the next few months to begin building relationships with the decision makers based on your need. This is also a great way to begin planning for the ICSHC Advocacy Day.**



Phone
Calls



Letters



Meetings



SHC
Visits



Promotional
Materials



Media

INTRODUCTION CALL: A good first assignment in building relationships can be to make a phone call. In the next month make a call to each of your five legislators or other decision makers with whom you want to build a relationship. Invite them to visit your facility or perhaps to make a few remarks at an advisory board meeting. Tell them that you'll be sending invitations to openings and other events. If you are unable to reach a lawmaker by phone, talk to an aide—your relationships with key staff will be no less important than your relationships with legislators. Always take notes of conversations.

LOBBYING CALL: Lobbying can also be done over the phone. You can generate phone calls into a legislator's office urging them to vote a certain way on a bill OR to communicate your position on the issues of School Health Centers, which may prompt that legislator to take on more leadership in making things happen. Here are some tips to effective lobbying by phone:

1. Understand that you may be speaking to an aide, not the legislator. Write down the name—you'll need it for follow-up conversations—the legislator's aides are the key people with whom you'll be dealing with most of the time
2. Be clear on what you want from this phone call. You're calling simply to register your informed opinion on a pending issue. You're successful if the lawmaker's office understands that a concerned citizen has weighed in with a strongly held opinion.
3. Introduce yourself and give your address, making clear you're a constituent or that the School Health Center you work at is in their district. If you have any special credentials, state them.
4. Say why you're calling: assuming you're calling about pending legislation, state the bill number and explain what the bill does (don't expect the lawmaker to have every bill memorized). Get right to the bottom line: you're calling to urge a yea or nay vote.
5. Pause briefly for a reply but be prepared to continue without feedback (the legislator or aide is likely taking notes and may want to hear you out before commenting).

ICSHC Action Alert Calls:

As we begin to build an advocacy network, ICSHC's Public Policy and Advocacy committee will be sending out Action Alerts to ICSHC contacts to make a lobbying phone call as part of a coordinated lobbying effort. These coordinated efforts can be extremely important. You can also build a network locally by keeping a list of parents, community leaders, school personnel and other key partners who would be willing to make a call or write a letter when ACTION is needed.

An Action Alert call is quick and easy because you can talk to whomever answers the phone at the legislator's office. They may patch you over to someone but, will basically record your personal information and your request. Here is a sample call:

They: Senator Smith's office, Chris speaking
You: Hello, I'm Karen Berg and I live at 1234 Smith Dr. in Chicago.
They: How can I help you?
You: I'm calling to urge Senator Smith to vote yes on the School Health Center bill 1234, which would increase funding for School Health Centers. School Health Centers provide comprehensive services while reducing lost school time, removing financial barriers and promoting family involvement. This bill would help expand services and establish new centers.
They: I will tell the Senator
You: Thank you.

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INTRODUCTION LETTER: We know you already know how to write a letter. These points will help you turn your letter-writing skills into effective lobbying.

Your first letter, however, will be about relationship building, not advocacy—a follow-up to your first phone call. In the next month, write each of your five legislators. Thank them for their time (or find something complimentary to say about the staff person you talked to). In coordination with the National School Health Center Awareness Month, request a meeting with one of your legislators. Also, use this letter to suggest a date for a visit to your facility, perhaps to make a few remarks at a meeting of your board—or extend an invitation to another event. You may want to plan a local advocacy event at your School Health Center and invite several decision makers to visit the facility talk to staff, students and parents.








LOBBYING LETTER:

Before you write about pending legislation, know whether the lawmaker supports the bill, or has voted to support similar legislation. ICSHC will provide you with this information in coordinated Action Alerts however, you can find out more information about your lawmakers and their previous voting records by visiting the web sites on page 3.

STEPS TO EFFECTIVE LETTER WRITING:

1. Use a formal address and salutation. Use your School Health Center letterhead or, where appropriate, the ICSHC letterhead. Type or write legibly. If you're a constituent, include your home address as part of the letter format.
2. In the 1st paragraph, reference the bill number and its popular name. In the same sentence make clear that you're writing to urge a yea or nay vote. Focus on a single issue.
3. In the 2nd paragraph, tell why this bill matters to you personally. Provide one or two compelling points to make clear how it affects your organization, and the quality of life in the district—e.g. how many people, or families, are affected. Remember, you're protecting not merely the interests of your organization, but the quality of life for the entire community.
4. In the 3rd paragraph, if the legislator supports the bill, be grateful and ask how you can help to improve its chances of passage. If the legislator has supported related legislation in the past, be grateful and suggest this bill deserves the same support. Otherwise, stress the broader implications of the bill, beyond its value to your organization, and your district.
5. Close with thanks for hearing you out, and ask how the legislator will vote. Offer yourself as a resource in explaining the bill's importance to colleagues (for example, at hearings) or to other constituents (for example, at town meetings).

TIPS:

-  Keep your letter to a single page.
-  Don't sign a pre-printed form letter.
-  Don't send a carbon copy to other legislators.
-  Don't begin on the righteous note of "as a citizen and taxpayer".
-  Don't apologize for taking their time.
-  Don't be rude or threatening.
-  Don't be vague.

See the sample letters that follow and feel free to use them as a guide when writing to a decision maker.

Personal visits are important not only to making your point, but also to cultivating a relationship with your legislators. These points are helpful in planning your visit to the district office or the Capitol.

Steps to Holding an Effective Lobbying Meeting

1. Research your legislator so you know the voting history and other relevant facts.
2. Decide on a team to make the visit—for example, a staff person of the School Health Center, a principal, parent and/or student and a member of the center’s advisory board.
3. Convene to be clear on your message. Assign the points you want each member of the team to make so that you can loosely follow your game plan without over-rehearsing it. Touch all the bases outlined in Item #7 below.
4. Write the legislator to suggest a range of dates and times—your legislator often relies on a scheduler to juggle a busy agenda. You will probably have to follow-up over the phone with the scheduler to get a meeting date set.
5. Arrive a few minutes early, and be prepared to wait—legislators’ schedules are packed tight and unavoidable delays are common. Again, don’t consider the visit a bust if you wind up meeting with a top aide—they’re usually the ones who do the serious follow-up anyway.
6. Legislators have to deal with a wide variety of concerns. Don’t assume familiarity with your issues. Expect to have to explain the details. After all, part of the reason you’re there is to offer your help in keeping tabs on these issues.
7. A sample game plan: (a) The administrator describes who you are, roughly how many people in the district the center reaches, and your association with the Illinois Coalition for School Health Centers; (b) The board member names the bill you came to discuss, or (for your first visit), your general concern for this session’s legislation, and how you hope legislators will vote; (c) Parent discusses the importance of the bill or role School Health Centers play in the well-being of their children and the entire community; (d) The school representative talks about how much of an impact the School Health Center makes on the school community; (e) The administrator provides a fact sheet on the bill or an information kit on the center and ICSHC. Check with ICSHC staff before attending a meeting for any up to date information on that legislator.
8. You’re not required to be an expert, and if you don’t have all the answers, say so—and offer to find out. This will give you an opportunity to follow up the visit with an informative letter.
9. Do write a thank-you note, providing any information you promised to send, along with an invitation to visit your facilities.
10. Update ICSHC staff on the visit, who you met with, who attended and what the legislator agreed to support (or not support).

See the samples that follow and feel free to use them as a guide when planning your next meeting.

The best way to convey what you're all about is to get the people that you hope to influence to the school health center. In most cases this will be the most effective form of advocacy. Visiting a center gives that decision maker the opportunity to get a sense of how the center operates, the impact it has on the school, meet the staff, see a great facility or see a facility that is in need of renovation. A picture is worth a thousand words.

Planning a visit to your center will take time. If your targets are legislators you'll need to make sure you begin early so that they will be able to fit it into their schedule. Find out the legislative schedules on the state and national levels to make sure you will pick potential dates when the legislator will be in the district. Use the checklist below to help you plan your visit.

Planning a School Health Center Visit

Three months before:

- Develop an agenda and theme.
- Pick potential site visit dates (make sure the dates work with your key messengers).
- Contact decision makers by letter and follow-up over the phone with potential dates.
- Once date is set place it on school, hospital and legislator calendars.
- If possible, work with the hospital marketing department to create a video or special recognition awards (depending on your theme you may choose to hold an event to pay special recognition to SHC champions).
- You may also want to contact school departments to arrange for school music or special entertainment.

Two months before:

- Forward invitations to agencies/organizations involved in the SHC program, as well as local businesses, industry, education, school board members and personnel, and the media.

One month before:

- Select parents, teachers, students, principal (s) to share their experiences and success stories.
- Recruit students to be involved in assisting that day with greeting visitors at the school's entrance, handing out programs, serving food, etc.
- Plan menu/refreshments.

One week before:

- Send out a press advisory to newspapers, radio and TV stations and begin follow up calls to the media.
- Confirm the invitees (especially legislators).
- Send program to printer.
- Schedule a photographer for the day of the event.
- Run through the agenda with all those who have a specific role on the day of. Make sure everyone is on message.
- Reserve any audio-visual or technical equipment you may need.

Day of:

- Decorate and set-up equipment.
- Confirm the media that morning before the event.

PROMOTIONAL MATERIALS

Promotional materials are an easy way to communicate your message to your targeted audience. ICSHC has recently created a promotional brochure that you can use to educate decision makers about the health status of Illinois' youth and adolescents, the benefits of school health centers and the Coalition itself. It may also be useful to create a flyer or brochure specifically for your center. The following are sample flyers from different states. Some of these are used in lobbying efforts. You have already gone through the steps to identify your need, identify your audience and define your message. You should follow those same steps when first creating your promotional materials.

Helpful Hints:

Pictures

Including pictures is a great way to show the action that happens in the center. If you don't have a professional photographer, try it on your own. Remember to make sure there is lots of light and that you take the picture closer rather than further away.

Quotes

This goes back to your strongest messengers. Who are individuals in your community that may influence your targeted audience? Ask these individuals to submit a quote. At times the individual may even ask you to write it for them!

Clear and Concise

Make your message strong, yet simple. The less text someone has to read the better.

Design

If you can utilize the resources at your hospital to create promotional materials you have a great head start. For others, Publisher or Microsoft Word templates are great programs that are user friendly and produce nice brochures or fliers. There may even be a staff person, student or parent that has design skills that you can ask to produce your materials.

M

Media is one of the best tactics of an outreach campaign and free media is one of the most critical. It provides you with the best opportunity to reach a large number of people and create more visibility around the issue.

Building a relationship with your media contacts is important just as with decision makers. Remember they are under pressure to produce so coming to them with an interesting story and good quotes makes their jobs easier.

Tips to working with the media

- ✓ Make sure you're communicating to the correct reporter or contact person.
- ✓ Stay in touch with reporters. Building a relationship means they may use you as a source on things relating to children and health.
- ✓ Make sure you are making your story newsworthy.
- ✓ Be opportunistic.
- ✓ Follow-up with reporters--check the status of a letter to the editor, confirm their attendance at an event or find out why they didn't write a story.
- ✓ Provide the media with quotable quotes.
- ✓ Be patient and pleasant—reporters are busy and often on deadlines. Don't be thrown by short comments and responses.
- ✓ Remember, anything you say can be quoted. Think through what you want to communicate beforehand and avoid making off-handed remarks or jokes.
- ✓ Know the deadline schedules.

Below are descriptions of three useful media tactics. You can refer to some of the samples on the following pages for specific formats.

Letters to the Editor:

Use this easy media tactic to respond negatively or positively to an article or editorial, related to your issue, that a newspaper, journal or magazine has printed. Lawmakers often pay close attention to what their constituents are writing about. Your letter should carry its most important message in the first paragraph. If you are referencing an article include the title, date and author of the piece in the opening sentence. The letter should be between 100-400 words. Remember to include your name, address and daytime and evening phone numbers so they can verify that you wrote the letter. The best tip in getting it published is to follow up by placing a call. Stress the urgency of publishing the letter because it is a timely issue.

Media Advisory:

The media advisory explains the who, what, where, when and why of an event and should provide just enough information to entice the media to attend. An advisory should be sent 4-7 days prior to the event. Again, remember to follow up.

Press Release:

A press release is like writing the story for a reporter. It helps the media frame your message accurately and to provide journalists with background information and quotes from speakers and/or key messengers. A press release helps to make a reporter's job easier, which in turn benefits your efforts. It should be sent immediately after the event or handed out to media that attend.

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USEFUL WEB SITES

American Academy of Pediatrics

www.aap.org

www.schoolhealth.org/index.htm

American Medical Association

- Adolescent Health On-Line www.ama-assn.org/adolhth

- Journal of AMA www.ama-assn.org/scipub.htm

American School Health Association

www.ashaweb.org

Association of State and Territorial Health Officials (ASTHO)

www.astho.org

Bureau of Primary Health Care's Health Schools, Health Communities

www.bphc.hrsa.dhhs.gov/hshc/hshc1.htm

Centers for Disease Control and Prevention (CDC)—Division of Adolescent School Health

www.cdc.gov/nccdphp/dash

Center for Health Care Strategies

www.chcs.org

Center for Health Policy Research

www.gwumc.edu/chpr

Center for Substance Abuse Prevention

www.health.org/pubs/mpw-book.mpw-book.htm#comp

Community Health Leadership Program

[Http://chlp.tiac.net](http://chlp.tiac.net)

Florida Health Kids Corporation: Florida Program National Replication

www.healthykids.org

Institute of Medicine—March, 1996 report on Primary Care

www2.nas.edu/onpi/pr/mar96/primcar2.html

National Assembly on School-Based health Care

www.nasbhc.org

National Association of children's Hospital and Related Institutes

www.nachri.org

National Center for Education in Maternal and child Health

www.ncemch.org

National Committee for Quality Assurance

www.ncqa.org

National Conference of State Legislators

www.ncsl.org/programs/health/pp/index.htm

National Health Policy forum

www.nhpf.org

Principles and Values of Louisiana School Based Health Centers

www.gwu.edu/~mtg/grant/la/laguide.html

Robert Wood Johnson Foundation

www.rwjf.org

Robert Wood Johnson—Making the Grade

www.gwu.edu/~mtg/

School health Initiative

www.gwu.edu/~shi

School Health Resource Services

www.uchsc.edu/sn/shrs

Society for Adolescent Medicine

www3.uchc.edu/~sam/introduction-index.shtml

Southern Institute on Children & Families

www.kidsouth.org

UCLA Center for Mental Health in Schools

<http://smhp.psych.ucla.edu>