



advocacy | action | answers on aging

Value, Relevance, Results in Challenging Advocacy Environments

Missouri Association of Area Agencies on Aging (ma4)

Lake Ozark, MO

August 17, 2015



— Celebrating 20 Years —

Connecting You to Community Services



THE AGING NETWORK'S
VOLUNTEER COLLABORATIVE

Engage the wisdom of age.

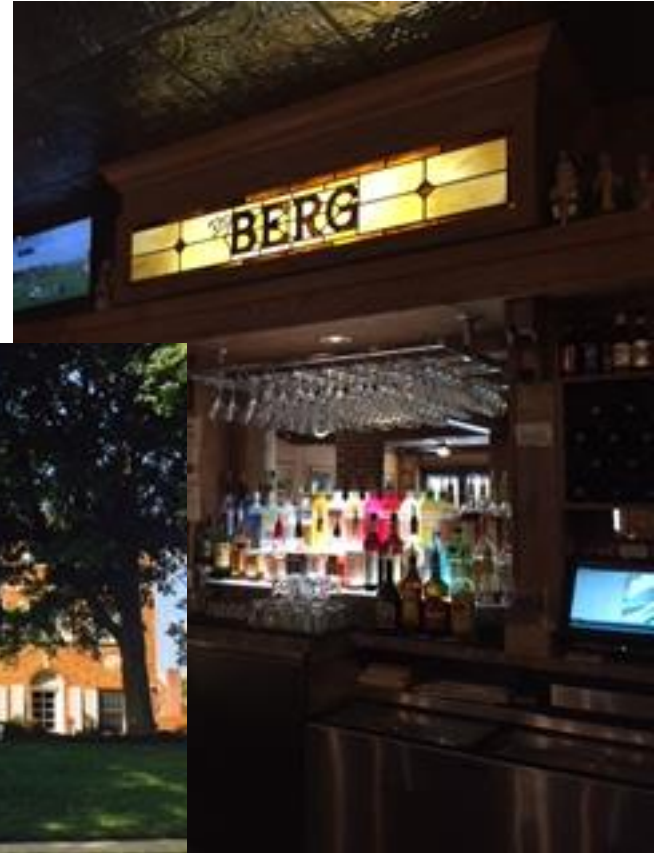


Aging and Disability Partnership

for Managed Long-Term Services and Supports



Livable Communities Collaborative



Agenda

- Basics of Advocacy
- Now You've Got the "In"
- Framing the Message
- Making the Ask
- Next Steps

Advocacy Basics





City Hall, St. Louis



The Older Americans Act on Advocacy

The Older Americans Act of 1965 (as amended in 2000) states that area agencies on aging shall:

"Serve as the advocate and focal point for older individuals within the community by (in cooperation with agencies, organizations, and individuals participating in activities under the plan) monitoring, evaluating, and commenting upon all policies, programs, hearings, levies, and community actions which will affect older individuals."

Supersedes any other federal or state law or regulations

What Does this Mean?

- You are an advocate
- You are obligated
- Your voice is meaningful
- Your voice echoes



If You Don't, Who Will?



- **No one**
- **Other good advocates!**
- Special interests with \$ to hire teams of lobbyists
- Donors

Lobbying vs. Advocacy

- Don't be afraid of the first word.
- Embrace the second.
- You *can't* use federal dollars to lobby, but you can ADVOCATE/EDUCATE.
- But you *can* lobby with other dollars even if you also have federal grants/funds.
- **You *can* engage your stakeholders!**
- "No" is not a dirty word.

To create value and relevance for your electeds, you can and should:

- **Respond to specific requests** for information, technical advice or assistance, or opinions from a Member of Congress, federal departments and agencies, or state legislatures.
- **Provide unsolicited communication** to elected officials (faxes, phone calls, e-mail) on issues that are of bona fide interest to older adults.
- Outside of the agency or organization, **share your views as a private citizen**, while still presenting your professional credentials.
- **Conduct non-partisan public education and candidate forums and debates.** Invite speakers to address both sides of an issue.

What We Face

- **Challenging Advocacy Environment**
 - **Tight budgets!**
 - **Skeptical electorate and elected officials**
- Competition for time from other interests
- Frenetic pace can mean “hurry up...and wait”
- Process, particularly around spending, means you have to time your request appropriately

What We Have

- **Value:**
 - Home and Community-Based Services offer a lower cost solution, saving taxpayer dollars
 - A solution (e.g., more dollars to serve more people)
- **Relevance:**
 - A compelling issue; human needs
 - An aging society—including electeds and their families/friends
 - Gaps in needs vs. services
- **Passionate advocates** that are powerful in numbers!!

What We Need to Achieve Results

- Consistent, strong messages
- Grassroots energy and commitment
- Shared sense of purpose
- **Active advocates willing to put in the time to build relationships, write to their local, state and federal elected officials and speak out about the needs of elders**

It's All About Relationships

- The hardest step to take is the first step: organizing and making outreach—again, and again...and again
- Understand you know more about aging issues than they do and **learn how to translate!**
- **Share your passion—it's catching!**
- They want to understand what resources are in your communities

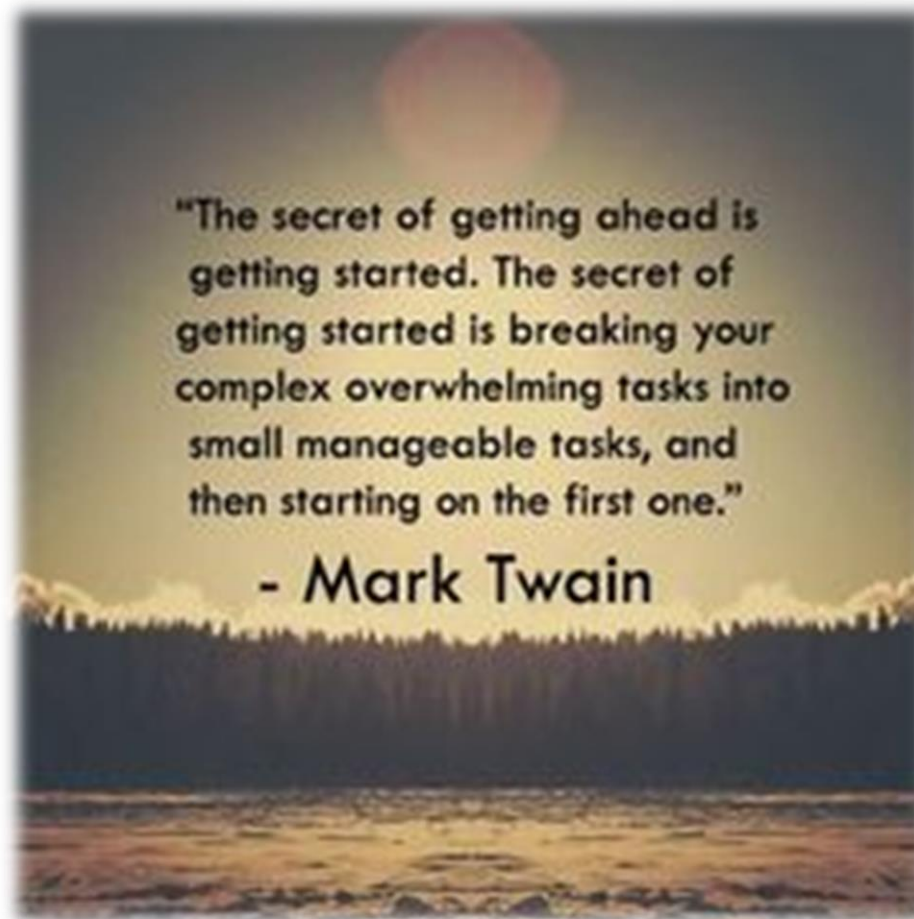
The Benefits of Building Coalitions

- Teamwork
- Shared success and commiseration
- Split the workload
- Varied expertise and networks
- Leverage power of many stakeholders
- Messages resonate louder



The Hardest Part...

Getting Started!



When to Take The 1st, 2nd and 3rd Steps?

- Today!
- And again tomorrow...
- A few other opportunities to engage your MOCs:
 - When you are in DC!
 - When they are in the District: know the annual Congressional Calendar for the House and Senate
 - Appropriations “season”
 - In response to major legislation that affects older adults you serve
- Also think about the events that are important to your agency and *their* constituents!

Keep in Mind...

- You will need to (and ultimately want to) get to know staff—both in the District and in DC.
- The office scheduler(s) should be your first point of contact for Member meetings
- Reach out often, even if it's not to request meetings
- Tell n4a when you are meeting with your members both at home and in DC. We can often tag-team.
- Schedules will change, time will sometimes be short—just roll with it.
- **Your MOCs *want* to hear from you!**

The Aging Network Goes to Washington...Or Washington Goes to the Aging Network...

- Start setting up the visits—both in DC and at home—early.



- Let n4a help.
- If you haven't, don't panic.
- Embrace the art of ankle biting. Congress is busy!

How to Prepare

- Organize materials prior to your visits—if going as coalition, know who will say what
- Be prepared to translate—how do your local organization and local issues connect to federal policies/priorities (OFTEN BIGGEST CHALLENGE FOR LOCAL ADVOCATES)
 - Local info at your fingertips
 - National/federal resources from n4a
- Include YOUR contact information, ask for THEIRS
- Have enough talking points for 5 minutes or for 30
- Be prepared to talk in any setting/area
- Prepare to follow up! State how you will and do so.

Now You've Got the "In"

Information to Bring with You

- Know a little about your MOC and your district/state
 - General record on aging issues
 - Key committees!
- Information on the types of calls your agency has been receiving
- Facts about the agency, services, funding and needs
- Stories *and* facts: information on how the agency has helped the community and a person who has benefitted from services
- **YOUR ASK!**
- **n4a Policy Priorities and info**

Congressional Visit Tracking Sheet

Member	Rep. Rosa DeLauro (D-CT-3)
Date/Time	Wednesday, April 23 @ 11:45 a.m.
Location	2413 Rayburn HOB
Issue Discussed	OAA Appropriations – meeting requested per FY 2015 Appropriations letter sent to Hill on 4/16
Materials to bring	Copy FY 2015 <u>approps</u> letter 2014 Policy Priorities Appropriations Chart
Relevant Committee	Ranking Member, House Appropriations Committee subcommittee on Labor-H
Staff member	Beverly Pheto
Position	Chief of Staff
Relevant n4a membership and other notes	<ul style="list-style-type: none"> • 6 CT AAA's • DeLauros District is the South Central portion of CT: https://www.govtrack.us/congress/members/CT/3 • Includes: <ul style="list-style-type: none"> ◦ Agency on Aging of South Central Connecticut, <u>lnc</u> – New Haven, CT ◦ Southwestern Connecticut Agency on Aging – Bridgeport, CT (edge)
Talking points to discuss	<ul style="list-style-type: none"> • OAA funding for FY 2015 – restore sequester cuts to all titles • EJI funding • ADRC funding in interim • The five Area Agencies on Aging (AAAs) in CT are private, not-for-profit corporations established in CT in 1974 to provide leadership and resources to meet the needs of the rapidly growing elderly population. • Under sequestration in CT OAA programs: <ul style="list-style-type: none"> ◦ Family Caregiver support – 7% ◦ Long-term ombudsman – 6%
Notes and follow-up items	

Resources

- **n4a staff and n4a.org!**
- MoC websites
 - Contact information
 - Bio information
 - District information
 - Legislative background
- House and Senate Member Contact Sites:
 - House: <http://www.house.gov/representatives/>
 - Senate: http://www.senate.gov/general/contact_information/senators_cfm.cfm
- Other helpful sites with MOC record/legislative info:
 - www.congress.gov
 - <https://www.govtrack.us/>

Before you walk in, remember...

- **You are the expert! You are valuable!**
 - When you walk into that office, you're their boss
 - MoCs and staff are there to serve you and they need your expertise and guidance
- **You speak the truth! You are relevant!**
 - Use talking points but say it in your own words so they know you believe it
 - Tell stories of real people in their district/state

What To Do: First Steps

- Warm-up small talk is fine but....
 - Don't forget to fully introduce yourself, your agency
 - Give the full name of your agency and mention, if not obvious, your AAA or Title VI status
 - Key high-level points to make now:
 - Your geographical turf (relate it to the District)
 - Numbers of clients served annually
 - Your mission in a nutshell!

What to Expect

- Meeting with a different person than expected
 - Downgraded to staffer from Member
 - Or Member comes in after meeting has begun
 - The meeting should pause
 - Do a 30-second introduction of yourself, your agency and then say “Senator, we were just talking with Mark here about...”
 - Then state your greatest need, followed by your most important ask
 - If time, keep going!
 - Get a picture for social media, n4a!

What to Expect

- Anything from gracious, sincere attention to your presentation to staff member who is...
 - Distracted
 - Rushed
 - Not engaged
 - Interested in debate rather than dialogue
 - Interrupted

What To Do: Transition Tips

- Try to get a sense of how well they know your issues
- Then pull them back to why you are there, showing connections between your work and federal funding or programs.
- It's an art, not a science, so go with the flow!

What to Expect...and Do!

- They may check their blackberries/phones
 - *Keep going!*
- Honor the time they say they have
 - *Shorten up your spiel!*
 - *Either reduce number of key asks or cut to the chase on the asks, less background*
- Know when to wrap things up so you end on a positive note, not too abruptly
- Make clear you have more to share the next time!

What NOT To Do

- **Assume** the staffer knows your issues or what your agency does (even if you know the Member personally!)
 - Setting the context is really important
- **Feel** you have to answer every question on the spot
 - You want something to follow up on!
- **Use** state or local acronyms without connecting the dots in both directions
 - Ex.: SHINE (state program); SHIP (federal funding/authority); Medicare beneficiaries who get help daily!

Framing Our Messages— Demonstrating Value; Creating Relevance

Key Messages to Weave In

- **VALUE**

- Of HCBS in general (saves mandatory money!)
- OAA's incredible \$3 to \$1 return on investment (and that's just leveraged dollars, not savings from better health, in-home care, etc.)
- If your program is evidence-based, be sure to mention that
- Stress local blooming of federal investment

Key Messages to Weave In

- **RELEVANCE**

- Your services to their constituents
- Talk about what will happen to the folks you serve if they don't get services
- Continued impact of sequestration on YOUR programs (show don't tell)

Tools to Help You

- Advocacy Cards say it quick
- n4a Policy Priorities make the case
- Hill Visit Tips for a refresher
- Talking Points to help you craft your message
- n4a staff
- **ma4/Local resources**

Address the Realities Head On

Let them know you know:

- Sequestration is law until 2021
- The discretionary slice of the full federal pie is shrinking
- The non-defense part of that slice is being reduced in favor of the defense part

But also tell/ask them:

- What those realities mean for older adults
- What are they going to do about this problem?

Making the Ask— Achieving Results

2015 Policy Priorities

- OAA Reauthorization
- FY 2016 funding
- Enhancing the Health of Older Adults
- Transportation and Livable Communities
- Preserving the Safety Net
- INSERT: Your local issues here

Next Steps for Back Home—Achieving Results

Afterwards...

- Send thank-you notes/emails/faxes to those staff and Members you met with
- Answer any questions you couldn't on site
- Follow up on your requests to Member
- Go to the next level (site visit, district mtg)
- Stay in touch with the staff especially!
 - Did you get a new grant?
 - Have to defund a provider or close a site?
 - Emerging issue locally with national implications? → ***Inform them!***

Go Get 'Em!

Save the Date!



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April 25-26, 2016 • Washington, DC • www.n4a.org



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Questions?

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