by the National Association of Area Agencies on Aging (n4a)

Advocacy

Advocacy is simply the support of an idea, cause, or – in this case, more aptly – a particular population. Successful advocacy requires a comprehensive understanding of the issues involved, and is almost always a byproduct of clear, concise communication and building positive relationships. Its key components include passion, persistence and patience; creativity, cooperation and collaboration; and energy, flexibility and resourcefulness in pursuit of an organization's objectives.

Area agencies on aging are not only encouraged to advocate for the older people in their districts, they are ***mandated*** to do so. Older Americans Act regulations specify that agencies "shall serve as the public advocate for the development or enhancement of comprehensive and coordinated community-based systems of services in each community throughout the planning and service area" (*45CFR:Sec.1321.61*). Among other advocacy-related requirements, the regulations stipulate that area agencies shall:

- *"Represent the interests of older persons to local level and executive branch officials, public and private agencies and organizations."*

- *"Monitor, evaluate, and, where appropriate, comment on all policies, programs, hearings, levies, and community actions which affect older persons."*

- *"Undertake a leadership role in assisting communities throughout the planning and service area to target resources from all appropriate sources to meet the needs of older persons with greatest economic or social need, with particular attention to low income minority individuals."*

Accordingly, each area agency should strive to educate locally elected officials (city, county, state and federal), as well as private service organizations, on the issues and concerns of older persons and the field of aging. Area agencies should also aim to ensure that older persons and those who care for them are aware of the programs, services and resources available to them in their respective areas. Far too many older Americans do not avail themselves of in-home and community-based services because, 42 years after passage of the Older Americans Act, they remain unaware of them.

Although it is often associated with political lobbying, advocacy can be many other things as well, including: letters to the editor and media campaigns; minority outreach and coalition building among stakeholders; public testimony; presentations at community forums and health fairs; and a number of other grassroots' efforts. Whatever form advocacy takes, however, certain fundamentals will usually apply. The following guidelines should prove helpful in efforts to increase the visibility of your agency and improve the lives of older Americans.

Advocacy Tools

A) Have an Effective Message

Develop a message that is easy to understand, appeals to core values and is broad enough to appeal to all major stakeholders. Provide reasons why it is important to act. Back up your message with facts and human-interest stories that hit home.

B) Enlist Major Stakeholders

Make sure you've brought everyone on board who cares about the issue(s) you are trying to address. Seek out the ideas and opinions of leaders in your field (e.g., the National Association of State Units on Aging, the National Citizens' Coalition for Nursing Home Reform, or AARP), or related areas, who have also tried to gain support for their cause. Form an informal or formal coalition as a way to engage other groups, to drum up support and to unify messages and activities. Depending on the issue, consider inviting these types of groups/individuals to the table:

- Women's groups/caucuses
- Older Americans' groups/caucuses (e.g, AARP)
- Caregivers
- Minority groups
- Disability community
- Social workers
- Other advocates, such as housing, transportation and anti-poverty activists

- Business Community
- Agencies of local or state government
- Volunteer or service organizations
- Faith community/ Religious leaders
- Community Leaders (who in your community really gets things done?)
- Children and Youth Issues Leaders (intergenerational efforts are very powerful)

C) *Increase Your Visibility*

There are many ways to gain visibility and attention for your agency and its services. Local newspapers and broadcast media are often happy to oblige a worthy cause brought home to readers and viewers by a related human-interest story. Create a press list of newspapers, TV and radio stations, and other media outlets throughout your area agency on aging. Send regular updates on your activities to the press and local opinion leaders. Feature prominent local leaders on talk shows, radio programs and in press articles. Commission studies and host events announcing the results of your findings. Enlist "champions" to encourage others to support your cause.

Current and former actors, sports stars and other notable people make excellent spokespersons for causes related to aging. Actress Shelley Fabares and former First Lady Nancy Reagan have done much for national and local Alzheimer's associations, for example. Actor Michael J. Fox has increased nationwide awareness and support for Parkinson's disease, and former Cincinnati Reds pitcher and broadcaster Joe Nuxhall recently played a vital role in raising millions of dollars for in-home services for the elderly in the Cincinnati area. Arrange site visits, awards or other events with legislators and other prominent decision-makers or opinion leaders.

Host a statewide "call-in" or other activity day to gain attention from legislators or other public officials. Compile compelling personal stories and invite the people involved to relay these stories in person at a planned event (site visit, press event, ceremony, etc.). Develop fact sheets and background papers and distribute them broadly. Participate in health fairs and be continuously on the look-out for opportunities to address at forums and seminars at local libraries, community halls and churches.

The ***Alliance for Justice*** has a Website devoted to **Nonprofit Advocacy**, providing information on technical assistance, publications, workshops, seminars, and legal referrals on a range of matters regarding nonprofit advocacy and participation in the public policy process. (www.afj.org/nonprofit/; or call: **866-NPLOBBY,** 866-675-6229)

Lobbying and Political Activities

There can be a very slim line between advocacy, lobbying, and engaging in political activities – thick splits of a fine hair. Both boards and advisory councils (as extensions of their organizations) should be very careful about these divides. *BoardSource* warns that the rules governing lobbying activities by charitable, tax-exempt organizations (such as area agencies on aging) are "complex, frequently misunderstood and have severe consequences." **(read more…)**

To demonstrate that complexity, *BoardSource* cautions that while the law "strictly prohibits political activities" by charitable, tax-exempt nonprofit organizations, this does not make it illegal for individual board members to be involved in politics, or support certain candidates for office, so long as those individuals are not representing or attempting to speak for the board.

And though partisan "political activities" (defined by *BoardSource* as "activities intervening directly or indirectly in any political campaign on behalf of or in opposition to any candidate for public office") are off-limits to nonprofit organizations, these organizations can conduct lobbying activities under certain circumstances. Lobbying (defined by *BoardSource* as attempting to "influence legislation") by nonprofit organizations is permitted under the condition that the lobbying activities do not constitute "a substantial part of the organization's total activities."

BoardSource notes that the IRS puts a dollar amount on the term "substantial" to guide organizations in adhering to the tax-exempt statutes. For example, nonprofit organizations may allot up to 20 percent of their first $500 in expenditures for lobbying activities; 15 percent for the next $500,000; 10 percent of the next $500,000; 5 percent of the next $500,000, on up to $1 million total in lobbying expenditures.

The IRS further stipulates that only 25 percent of all non-profit expenditures can be devoted to grassroots lobbying (i.e., efforts to gain political support of the general public). Though it is highly unlikely that an area agency on aging would reach that 25 percent cap, it is critical that agencies carefully track their lobbying activities and funds –and all the more reason for boards of directors/trustees to consult legal counsel in areas of uncertainty related to lobbying. There will usually be many.

Contacting Elected Officials

Identifying Your Area's Members of Congress

Making contact with the elected officials in position to help your agency is always a good idea. You may wish to include them on your agency's mailing list, invite them to aging-related functions, or find other ways to let them know the value and/or need of certain aging services in the district they represent. If the AAA or Title VI program serves people from multiple congressional or state legislative districts, it's important that you be in touch with all of those senators and representatives, regardless of where your agency's central office is located.

Most area agencies on aging will have a roster of their respective political representatives. For those that don't, the information is readily available. Congress, of course, serves all 50 states, as well as the District of Columbia, the five U.S. territories as well as the tribal organizations, and the information for phoning, faxing or e-mailing your state Congressional representatives is easily located on the Internet.

(Please Note: Those without Internet access or experience can obtain the above and following information through their local and/or state boards of election, addresses and phone numbers of which should be available in local phone books and libraries.)

To identify and contact your **Senators:** www.senate.gov

To identify your **Representatives:** www.house.gov

How to Reach Members of Congress

PHONE: Every member of Congress maintains a web page that should contain the phone numbers of his/her Washington, D. C., office as well as any local offices. (To find your member's web page, go to www.house.gov or www.senate.gov) This will also be listed in the phone book. If you want to call Washington and don't have time to look up a number, use the Capitol Switchboard at **202-224-3121**; operators will connect you to the office you want.

FAX: Faxing a letter can be a great way to be in touch with your elected officials. Fax numbers should be available on your member's web site or listed in local phone books.

EMAIL: Another good way to send an advocacy message, email also has some limitations you should be aware of. Most congressional offices offer a web-based form for communication to specific legislators, but do not accept general emails. This allows them to filter out correspondence from individuals not residing in the legislator's district or state. To send a message to your member, go to www.house.gov or www.senate.gov and use the lists of members to connect to his/her web site. It should be clear how they want you to use their communication system.

U.S. MAIL: We do not recommend corresponding via regular U.S. mail. The process by which it must be irradiated and scanned creates long delivery delays and greatly reduces the quality and strength of the document (i.e., letterhead may be faded and stationery crumbly by the time it reaches Capitol Hill). If you prefer to type or hand-write your correspondence, deliver it to your legislator via fax.

Identifying Your Area's State and Local Representatives and Political leaders

Those in the aging network will find that the late Speaker of the House Tip O'Neill knew what he was talking about when he said, "All politics is local." Though Congressional representatives potentially wield broader influence, many important government policy decisions are made and applied locally. This seems particularly true in the field of aging, where there can be significant differences in funding and services among area agencies and tribal organizations – both within certain states and across the country. If your agency doesn't have contact information for local political representatives readily available, the Internet – and its rapid and reliable search engines – has made identifying political representatives very easy.

In most cases, a *Google* search with a state's name followed by the word "legislature" should bring up a Home Page with the desired rosters of state representatives and senators, including links to legislative district maps. As with Congressional districts, you may need your "ZIP plus four" zip code to correctly identify the representatives and senators for your agency. Governors, county commissioners and city/village council contacts should also be traceable via *Google* searches containing the localities searched along with the terms "governor," "county commissioners" and/or "city council." Though traditional U.S. mail may work better locally, the same information given for contacting Congressional representatives applies generally to contacting local government officials. Whether writing a traditional letter, fax, or email, use the following forms of address to your Congressional representatives. For state and local government leaders, the same form – with appropriate substitutions in titles and names, of course – should do just fine. In general, keep the letter as congenial, clear and concise as possible.

(**Again:** For those without access to, or familiarity with, the Internet, an inquiry to the local library or board of elections should suffice for locating the above information.)

Correct Forms of Address:

U.S. SENATOR	U.S. REPRESENTATIVE
The Honorable (Full Name)	The Honorable (Full Name)
United States Senate	U.S. House of Representatives
Washington, DC 20510	Washington, DC 20515
Dear Senator (Last Name):	Dear Representative (Last Name):

Building Relationships

How to Request a Visit

There's seldom a better way to build meaningful rapport than in-person contact. But preliminary steps are usually required as a matter of protocol. Most requests for a representative's, senator's or other local leader's time (whether a visit to his/her office or a site visit to your agency) should be put in writing and faxed to the representative's office. (**Note**: This ***is necessary*** for meetings with members of Congress; and be sure to put such requests to the attention of the "Scheduler.")

Follow up 2-3 days after your invite/request has been sent by calling to inquire about the status of your invitation. If you can't get on the government official's calendar the first time around, ask to meet with a relevant staff member. This may be particularly helpful when dealing with Congress, where the best way to a representative is often through his/her staff members!

Face-to-Face Visits

Meeting face-to-face with your political representatives, and/or their staff, is one of the most effective advocacy tools at your disposal. Here are a few quick tips to help you make your visits successful.

Be Prompt

Try to be on time for all your meetings, even though government officials may keep you waiting. Schedules change quickly, especially on Capitol Hill, but you want to be reliable and courteous.

Be Patient

Be prepared to encounter changes at the very last minute. A visit scheduled with a government official, particularly members of Congress, may suddenly turn into a meeting with staff. Be gracious and go with the flow. **Note:** You never know where a Hill meeting with your Congressional representative might be held — from a Senator's grand office to a hallway; or even the building's cafeteria.

Be Polite

Treat everyone you encounter as a potential ally. Staff members may be young and not know a lot about your issues, but they are often gatekeepers to political leaders and could end up being your best point of contact. See your meeting as an opportunity to build relationships with ***all*** those in your representative's office.

Be Prepared

First of all, know your audience. The more you know about your representative's philosophy, interests and awareness of your agency, the better you can converse about your concerns in ways s/he can understand. Have your talking points ready and know what you want to cover in the meeting. But, also remember that you will need to be flexible — if you end up with less time than you planned for, present the short version. If you are visiting as a group, be sure to plan in advance who will say what in the meeting. Bring along materials that can be helpful to staff, like short fact sheets, stats on your PSA, etc. Whenever possible, make your case with hard numbers. They often speak much louder — and more convincingly — than words.

Be Persuasive

Be clear about what you are asking for (e.g., increased appropriations, livable communities' initiatives, etc.) and why it is needed. People are constantly coming to lawmakers asking for more money, so you need to make the best possible case.

Be Passionate

Use anecdotes to bring your programs and services to life. As you know, many government leaders have personal experiences of their own with older family members, friends and neighbors, and they will readily connect with real life examples of how your agency helps older adults remain in their homes and communities. Political representatives and their staff are usually passionate about their work, too, so use language that allows them to get excited about your mission and how they can help you.

Be Realistic

Government officials, and even their staff, have tremendous work loads and are sometimes at the mercy of more pressing issues. (This is especially true in Congress, where floor action or committee schedules may pull representatives away from original schedules.) Do not be discouraged by such events. Simply reschedule and try again. If you are given generous time, use it wisely. But be aware that most visits will be rather short and sometimes subject to interruption. But, keep in mind that even a ten-minute visit can still be very effective!

Be a Resource

Ask the government official and/or staff member what you can do for them. If they ask questions you can't answer, promise you'll get back to them later. Offer to send any additional materials or data they may need or be interested in. Invite them to visit your agency to learn more about aging programs and services in the area, and let them know you welcome their calls if they have any questions about aging policy. Your goal is to become their local aging expert so that you can help them advocate for what your community needs!

Follow Up

Be sure to follow up after the visit. Send a thank you note/email, then suggest a next step that will further your relationship with the representative's office. And stay in touch. You now have, at the very least, the name of a staff member who is tasked with following aging issues. Ideally, you will have such contacts at the local, state and federal level. And, the federal contact will give you a jump on things when the National Association of Area Agencies on Aging (n4a) send out an *Advocacy Alert* asking your agency to call or email Congress on certain issues. You will have a personal contact who may be more inclined to listen to your particular concerns on the matter.

Identifying Critical Legislators

Members of Congress, as well as state senators and representatives and city/village council members, serve on committees that govern a particular policy area, agency of government or function. You should take the time to find out which committees your representatives are on — this will help you better understand what they are most interested in and how you can make a connection.

More Information:

For more information on legal responsibilities and/or questions related to advocacy and lobbying by nonprofit boards of directors/trustees, please contact:

BoardSource: Suite 900/ 1828 L Street, NW/ Washington, DC 20036. Telephone: 202-452-6262; Fax: 202-452-6299. Website: www.boardsource.org/; and/or

Alliance for Justice: Washington, D.C., Office – 11 Dupont Circle, NW/ 2nd Floor/ Washington, DC 20036. Telephone: 202-822-6070; Fax: 202-802-6068. Website: www.afj.org/nonprofit

Alliance for Justice: West Coast Office – 519 17th Street/ Suite 560/ Oakland, California 94612-1257. Telephone: 510-444-6070; Fax: 510-444-6078. Website: www.afj.org/nonprofit.

For easy recollection, ***Alliance for Justice*** may also be reached by phone at: 866-NPLOBBY (866-675-6229).

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For more detailed information on the political process that may be useful to your agency, please see the following:

How a Bill Becomes a Law

For a refresher on the federal legislative process, go the U.S. House of Representatives's web page: www.house.gov/house/Tying_it_all.shtml

Glossary

Unsure what a legislative term means? Turn to the U.S. Senate Glossary: www.senate.gov/pagelayout/reference/b_three_sections_with_teasers/glossary.htm