

# EFFECTIVE ADVOCACY FOR NONPROFITS

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Mobile Health Clinics Association Forum  
Charlotte, NC  
September 22, 2012

# TODAY'S PRESENTATION

1. Review of last year's presentation on advocacy and lobbying
2. What information you need to collect to be prepared to be an effective advocate
3. How to identify people to advocate to
4. How to arrange meetings and what information to deliver at these meetings
5. How to maintain contact

# REVIEW OF LAST YEAR

- ▣ Advocacy is not only allowed, it is encouraged
- ▣ You have a responsibility to the people you serve to ensure governmental officials know about your services
- ▣ You have a responsibility to ensure that the “sector” is known and understood by governmental officials
- ▣ Advocacy is distinct from lobbying
  - Lobbying needs a specific piece of legislation

# THE IRS, GOVERNMENTAL AFFAIRS ACTIVITIES, & NONPROFIT STATUS

- ▣ The IRS defines 3 distinct categories of activities when nonprofits interact with governmental organizations:
  1. Political Activity
  2. Advocacy Activity
  3. Lobbying Activity

# POLITICAL ACTIVITIES

- ▣ Endorsing or opposing candidates for elective office
- ▣ Donating money
- ▣ Organizational activity in campaigns
- ▣ “Inconsistent” notifying/criticism of positions or votes of elected officials and candidates
  
- ▣ NEVER ALLOWED
- ▣ Will put your nonprofit status at risk
- ▣ Again, NEVER ALLOWED
- ▣ Did I mention these activities are NEVER ALLOWED

# LOBBYING ACTIVITIES

- ▣ A communication with legislative officials or their staffs to discuss legislation
- ▣ Asking your membership to communicate with legislative officials or their staffs to support/oppose legislation
- ▣ Communicating with legislative officials, their staffs, or the public on legislative initiatives or referenda

# ADVOCACY ACTIVITIES

- ▣ Speaking out on issues of importance to your organization
- ▣ Providing nonpartisan studies, expertise, analysis, and research
- ▣ Testifying at committee hearings
- ▣ “Self-defense” communication
  
- ▣ Always allowed
- ▣ Will not put your nonprofit status at risk

# WHY ENGAGE IN ADVOCACY?

- ▣ You have a responsibility to the people you serve to ensure governmental officials know about your services
- ▣ You have a responsibility to ensure that the “sector” is known and understood by governmental officials
- ▣ Government plays an inherent role in all of our lives
  - “External authorizing environment”

Hatch ‘em

Match ‘em

Dispatch ‘em



If you can't measure it,  
you can't control it.

Read it

Learn it

Live it

# WHAT YOU NEED TO BE AN EFFECTIVE ADVOCATE

▣ What you do

▣ Where you do it

▣ Who you do it for

# WHAT YOU DO

- ▣ What services do you provide?
  - Be specific
    - ▣ “Healthcare” doesn’t count
    - ▣ “Filling a coverage gap” doesn’t count
    - ▣ “Reaching the hard to reach” doesn’t count
    - ▣ “Saving the world” doesn’t count
- ▣ What innovations have you established?
- ▣ How are you being creative?
- ▣ How are you meeting a need?
- ▣ How are you saving money?

# WHERE YOU DO IT

▣ What Congressional District are you in?

▣ What Congressional District(s) do you serve?

▣ What state are you in?

Do you serve clients from more than one state?

▣ What County are you in?

Do you serve clients from more than one county?

▣ What municipality are you in?

Do you serve clients from more than one municipality?

# WHO YOU DO IT FOR

- ▣ What does your client population look like?
  - Age
  - Race
  - Sex
  - Marital status
  - Household size/composition
  - Economic status
  - Insurance status
  - Medical needs

# WHO TO OUTREACH TO

## ▣ Federal Government

- U.S. Senators
- U.S. Representatives
- Regional Offices

## ▣ State Government

- State Legislators
- State Departments

## ▣ County Government-Municipal Government

- Departments of Public Health

# WHO TO OUTREACH TO

## ▣ Federal Government

- Congress

- ▣ Staff Members

- District Staff

- DC Staff

- Legislative Assistants

- Regional Offices

- ▣ “Eyes and Ears” of Department in that area

# WHO TO OUTREACH TO

- ▣ Which Members of Congress?
  - Your representative and senators
  - Other representatives of districts you serve
  - Other representatives in state delegation who are on committees of jurisdiction
  - Other representatives in state delegation who like what you are doing
    - ▣ Interested in healthcare
    - ▣ Interested in constituencies you serve



# WHO TO OUTREACH TO

## ▣ State Government

- Legislature
- State Departments of Health
- Other departments focused on constituencies you serve
  - ▣ Veterans Affairs
  - ▣ Housing and Urban Development
  - ▣ Elder Affairs
  - ▣ Children Services
  - ▣ Mental Health

# WHO TO OUTREACH TO

- ▣ County-Municipal Government
  - Local Legislators
  - Mayors
  - Departments of Public Health

# HOW TO FIND THESE PEOPLE

- ▣ Check with you “parent” organization
- ▣ Federal Government
  - Congressional Staff
    - ▣ <http://www.congress.org>
    - ▣ <http://www.house.gov>
    - ▣ <http://www.senate.gov>
  - Department websites to find regional offices
- ▣ State & Local Governments
  - Websites for each state/locality
  - Congress.org has contact information for some state legislators

# HOW TO SCHEDULE A MEETING

- ▣ Call the person you identified
  - You run a mobile clinic and would like them to visit to learn about your services
  - You want to explain how your clinic specifically and mobile healthcare generally fit into the healthcare delivery system
  - You want to be a resource to them as healthcare continues to be an important topic/issue

# HOW TO SCHEDULE A MEETING

## ▣ Follow up with an email

- House emails are  
firstname.lastname@mail.house.gov
- Senate emails are  
firstname\_lastname@office.senate.gov

# INFORMATION TO PROVIDE AT MEETING

- ▣ Role of mobile health in the United States healthcare system
  - Who it serves
  - Its scope
  
- ▣ Role of mobile health in state/congressional district/locality healthcare system
  
  
- ▣ Role of your specific clinic in healthcare system

# INFORMATION TO PROVIDE AT MEETING

- ▣ Who you are serving
- ▣ Why you are needed
- ▣ Innovations you have implemented
- ▣ Creative ways you are meeting the needs of the community
- ▣ Successes you have had
- ▣ Ways you are saving money
  - Be realistic
  - Direct and Indirect
  - Mobile Map

# FOLLOW UP

- ▣ Send a thank you note
- ▣ You should send a thank you note
- ▣ Did I mention sending a thank you note?
- ▣ Ask to add to email lists
- ▣ Send any new announcements
- ▣ Reach out on new legislation/issues



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