**TEMPLATE Health Center Advocacy Plan**

*This template is meant to be a guide your Health Center’s Advocacy Plan, and includes priorities and other areas for you to consider incorporating, but is not an exhaustive list.* ***The intention of this guide is that your Health Center will make this your own****—feel free to simplify or build out the plan in places where that makes sense. It should not serve as a rigid guide, as other items (like national initiatives (i.e. NACHC’s ACE and Advocacy Leadership programs), conferences, social media plans, state & local initiatives, etc.) should also be included in addition to or in lieu of some of the items below.*

1. **Making Advocacy Organizational Priority** – Overarching goal: to make advocacy a known organizational priority, creating a culture of advocacy across the board and staff, and institutionalizing advocacy as a part of all elements of health center work and operations.
   1. **Board Resolution:** Pass a health center board resolution by \_\_\_date\_\_\_\_ with express commitment to making advocacy an organizational priority, including specific goals for engagement, performance, and outcomes. *\*\*Template available at* [*http://www.hcadvocacy.org/cultureofadvocacy*](http://www.hcadvocacy.org/cultureofadvocacy) *\*\**
   2. **Strategic Plan:** Incorporate long range advocacy goals as part of the health center strategic plan by \_\_\_\_date\_\_\_\_. *Ie: identifying health center key contacts for all elected officials, cultivating at least one Congressional/State based champion, achieving Gold Level ACE Status etc.*
   3. **Data Analysis:** Completing data analyses that show the impact of potential or proposed changes to the Health Center Program are invaluable both for your ability to plan internally, as well as make the case to elected officials at all levels of government. Health Center leadership and board members should be involved in this process to 1) complete the analyses \_\_\_\_with X frequency\_\_\_ or by \_\_\_date\_\_\_\_ and 2) devise a plan for how to use and share this information both internally and externally. *\*\*A Health Center Funding Cliff Calculator/Impact Estimator and a Medicaid Calculator/Impact Estimator for 2017 can be found at* [*http://www.hcadvocacy.org/makethecase*](http://www.hcadvocacy.org/makethecase) *\*\**
   4. **Advocacy Committee**: Create a standing Advocacy Committee by \_\_\_\_date\_\_\_\_, composed of Board and Staff members tasked with driving advocacy initiatives across the organization
      1. Establish schedule and timeline for recurring meetings on \_\_\_\_date\_\_\_\_.
   5. **HR Policies:** Board and leadership agreement and directives on HR Policies for the following areas as related to advocacy participation and initiatives at the health center. By \_\_\_\_date\_\_\_\_\_.
      1. **On boarding New & Existing Staff:** 
         1. Create HR process/policy for onboarding new health center staff into the culture of advocacy at the health center including the option to sign up as a health center advocate and basic information on importance of and what that participation will entail. By \_\_\_\_Date\_\_\_\_.
         2. Leadership sends communication to all existing health center staff explaining the importance of advocacy, providing the option to sign up as health center advocates and outlining any HR/Health Center policies regarding advocacy and advocacy participation. By \_\_\_\_date\_\_\_\_\_.
         3. Provide opportunity for all staff to become health center advocates, either by self-selection, or auto enrollment with the opportunity to opt out at any time. By \_\_\_\_date\_\_\_\_.
      2. **Statement of non-partisanship:** Publicly post or otherwise issue a statement of non-partisanship by \_\_\_\_date\_\_\_. *\*\*Sample non-partisanship statements available at* [*http://www.hcadvocacy.org/legalese*](http://www.hcadvocacy.org/legalese) *\*\**
      3. **Social media policy:** Establish a clear organizational policy on social media, for both administrators and staff using social media personally as it relates to the work and advocacy they do at the health center by \_\_\_\_date\_\_\_\_.*\*\*Sample social media policies available at* [*http://www.hcadvocacy.org/legalese*](http://www.hcadvocacy.org/legalese) *\*\**
      4. **Staff activities during election season:** Establish an organization policy for staff conduct and engagement in campaign activities as staff members vs. citizens to provide clarity and clear boundaries by \_\_\_date\_\_\_. *\*\*Sample policy available at* [*http://www.hcadvocacy.org/legalese*](http://www.hcadvocacy.org/legalese) *\*\**
   6. **Board & Staff Meetings:** Incorporate advocacy as a standing item as part of all staff and board meetings as of \_\_\_\_date\_\_\_\_.
   7. **Staff Responsibilities (CEO & Others):** 
      1. Establish basic expectations for how the CEO should lead the organization in making advocacy an organizational priority, including identifying other staff to help support advocacy as a priority by \_\_\_\_date\_\_\_\_.
      2. Designate at least one staff other than the CEO to serve as the Advocacy Coordinator for the Health Center who will be responsible for \_\_\_\_\_\_x\_\_\_\_, \_\_\_\_x\_\_\_\_\_, and \_\_\_\_\_x\_\_\_\_\_, by \_\_\_\_date\_\_\_\_\_.
   8. **Clear Goals & Expectations:** Establish clear initial organizational goals and expectations relative to making advocacy an organization priority by \_\_\_\_date\_\_\_\_.
2. **Operationalizing Advocacy – Overarching Goal:** to establish clear advocacy procedures, protocols and expectations as a part of all health center operations so that all staff are not only aware of advocacy as an ongoing priority, but how advocacy fits into and bellows with all elements of health center scope, operations and core culture.
   1. **Leadership Models the Way:** leadership will serve as a key model and provide endorsement of advocacy as an organizational priority in the following ways; 1) enforcing advocacy as a standing agenda item for all staff meetings, 2) allowing time and encouraging staff to take action when asked to do so by NACHC or the PCA, 3) recognizing staff (and others) that make significant contributions to advocacy programming and success, 4) publicly and repetitively speak to their commitment to and own action on advocacy and the role others can and should play in advocacy at the health center, by \_\_\_\_date\_\_\_\_.
   2. **Staff Engagement:** establish clear expectations for how staff can and should engage in health center advocacy as advocates, including but not limited to; 1) signing up as advocates, 2) how to, and the importance of taking action as well as the rules for doing so, 3) raise awareness about advocacy tools and platforms to advocate (advocacy platform, social media etc). By \_\_\_\_\_date\_\_\_\_\_.
   3. **Training Opportunities:** Establish regular opportunities for onsite and virtual (webinar) advocacy training, either by working with NACHC/PCA or enabling staff to become trained and train others by \_\_\_\_date\_\_\_\_.
   4. **Responding to Calls to Action:** Establish a clear plan for activating staff on to calls to action including; 1) notifications/communication from leadership, 2) follow up, 3) reporting back on response rates and outcome, by \_\_\_date\_\_\_\_.
   5. Using Technology for Advocacy – Social Media Policies
   6. **Recruiting Plan(s):** Establish an advocate recruiting plan including; timelines, necessary resources & materials, key staff, and goals by \_\_\_\_date\_\_\_\_\_.
   7. **Clear Goals & Expectations:** Establish clear goals for benchmark work on the following; 1) response rates to calls to action - work with NACHC/PCA to track responses when able and/or designate leads on staff to track activities, 2) NHCW events & participation, 3) visits by elected officials, 4) number of advocacy trainings, 5) number of media placements/measureable visibility, 6) advocacy network growth, 7) engaging community partners, etc. By \_\_\_\_date\_\_\_\_.
3. **Engaging the Community in Advocacy – Overarching Goal:** to educate and engage the community stakeholders in health center advocacy initiatives, events, and specific actions to support the operations and vital role the health center plays in the community.
   1. **Patients:** Establish a clear plan and goals for how to educate and engage patients in advocacy initiatives, including; 1) the creation of basic education materials and simple advocate sign up forms, 2) process and procedure for how to offer patients an opportunity to get more involved and sign up as an advocate *(ie: as part of the health center intake process),* 3) establish a plan to continually engage this network work of advocates, 4) set clear recruiting goals to build the patient advocate network, by \_\_\_\_date\_\_\_\_\_.
   2. **Partners:** Establish the following items to support engagement by community partners in health center advocacy efforts; 1) create a list of possible partners to approach as advocacy specific partners, 2) identify appropriate spokespeople at the health center to begin/introduce the conversation, 3) determine what specific actions or type of support you would like them to take as advocacy partners, 4) establish clear goals and timelines for how the health center will measure success and effectiveness in these partnerships, by \_\_\_\_date\_\_\_\_\_.
   3. **Influencers:** Establish the following items to support engagement by influencers in community in health center advocacy efforts; 1) create a list of possible influencers to approach as advocacy specific partners *(ie: conduct a relationship inventory among board members, senior staff, providers etc),* 2) identify appropriate spokespeople at the health center to begin/introduce the conversation, 3) determine what specific actions or type of support you would like them to take as advocacy influencers, 4) establish clear goals and timelines for how the health center will measure success and effectiveness in these partnerships, by \_\_\_\_date\_\_\_\_\_.
   4. **Media:** Establish the following items to support engagement with the media in health center advocacy efforts; 1) create a list of media outlets to approach and develop relationships with, 2) identify appropriate spokespeople at the health center to begin/introduce/lead the conversation, 3) begin basic education and/or extend invitations to visit the health center and all appropriate future events, 4) establish clear goals and timelines for how the health center will measure success and effectiveness in these relationships, by \_\_\_\_date\_\_\_\_\_.
   5. **Elected Officials:** Establish the following items to support relationship building/maintenance with elected officials for the health center; 1) create a list of elected officials and corresponding relationships *(ie: conduct a relationship inventory among board members, senior staff, providers etc),* 2) identify appropriate individuals at the health center to ensure foundational education about the HC, and cultivate a supportive relationship, 3) determine what specific actions or type of support you would like from your elected officials, 4) establish clear goals and timelines for how the health center will measure success and effectiveness in these relationships, by \_\_\_\_date\_\_\_\_\_.
   6. Other
4. **National Health Center Week & Observances – Overarching Goal**: leverage National Health Center Week (NHCW) and other observances to maximize opportunity to raise awareness and visibility about the success, effectiveness, role and importance of the health center in the community.
   1. **Staffing:** Identify key staff, board and volunteers that will lead efforts to coordinate NHCW activities at the health center by \_\_\_\_date\_\_\_\_.
   2. **Plans & Resources:** Create a list of existing and needed resources to plan and execute successful NHCW activities and begin the creation of supporting plan and timeline for these activities by \_\_\_\_date\_\_\_\_.
   3. **Goals & Expectations:** Establish clear goals and expectations to measure success and benchmark planned activities by \_\_\_\_date\_\_\_\_.
5. **Reporting, Revisions & Status Updates – Overarching Goal**: to ensure advocacy work and initiatives are appropriately tracked and reported to leadership, staff and board, with built in opportunities to revise plans as necessary in order to maximize success and effectiveness.
   1. **Benchmarking:** Set a timeline of opportunity to evaluate progress, effectiveness and success, including specific goals for categories of advocacy work (ie: advocate recruiting, media placement, identification of health center Key Contacts, visits with elected officials etc) by \_\_\_\_\_date\_\_\_\_\_.
   2. **Reporting:** Determine the frequency, respective audiences, and point person(s) for reporting back on progress and success relative to advocacy work/plans by \_\_\_date\_\_\_\_\_.
   3. **Recognition:** Establish a plan to and the ways in which you will recognize key advocates, supporters, volunteers etc. as well as any resources needed to do so by \_\_\_\_date\_\_\_\_.
   4. **Celebration:** Identify at least one opportunity (perhaps NHCW) to celebrate contributions to, the success of, and the progress made in making advocacy an organizational priority, and creating a true culture of advocacy at the health center by \_\_\_\_date\_\_\_\_.