



# Partners In Health

ENGAGE

## Advocacy Lead Manual

2016-2017



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## Introduction

### Why are we here?

Each year, malnutrition kills more than 3 million children worldwide. And every day, nearly 800 women die in childbirth. Needless, completely preventable deaths like these are driven by poverty and inequality. At Partners In Health, we believe that health is a human right, and we work to deliver high-quality health care to the poorest of the poor.

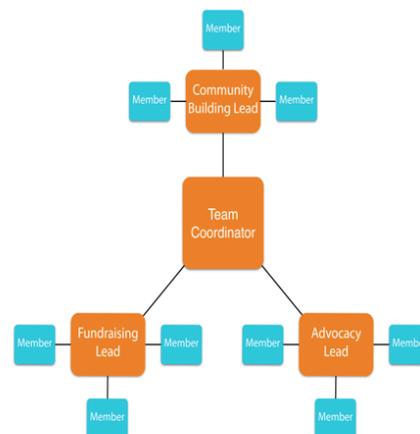
But the right to health—to not die in labor, to not die from starvation—will only be won through the work of a broad social movement of committed individuals. This is why we've built PIH Engage, a grassroots network of volunteer community organizers. Teams all over the country have committed to advocate for global health policy change, to educate the public about global health equity, and to generate unprecedented resources to support Partners In Health's lifesaving work.

### How are we structured?

In order to be more effective in achieving our goals, we employ a formalized *shared* leadership structure for PIH Engage teams. A leadership team offers a structured way to work together interdependently, recognizing and leveraging the unique talents of the individuals who make up the team. Team structures also help create strategic capacity—the ability to work creatively together in ways that produce more vibrant, engaging strategy than any individual could create alone. Leadership teams have clear missions and goals that all team members work towards through collaboration, creativity, and commitment. Leadership teams are also essential in providing a foundation from which an organization can expand its reach, as no one person can singlehandedly create an organization of massive scale.

Most importantly, your team structure must be *interdependent*. An interdependent leadership structure not only capitalizes on an individual's unique skill set and resources, but creates an environment of both support and accountability. Effective interdependent leadership takes the form of a “snowflake” as shown here:

Each team will have an Advocacy Lead, Community-Building Lead, and Fundraising Lead, in addition to a Team Coordinator who will oversee the other leads and the rest of the team members. Having four designated leaders will allow tasks to be divided easily and equally. Additionally, because each leader has a distinct role, the National Team in Boston will be able to provide specialized training to each of the different lead types through webinars and coaching calls.



### Your role as an Advocacy Lead

As an Advocacy Lead, you will spearhead the team's efforts to contribute to policy change. You will become experts in understanding what PIH Engage means by advocacy, and will be trained in (and will train your team in) a number of advocacy tactics. Throughout the course of the year, you may organize and oversee call-ins, meetings with members of Congress, bird-dogging efforts, publications in local media, and/or rallies. In order to achieve the team's advocacy goals, you will help recruit a 3-5 member advocacy team to assist in these actions. The Advocacy Lead will also attend online training webinars led by the PIH Engage National Team in Boston.

### What do we mean when we say "advocacy?"

"Advocacy" sometimes means different things to different people. Some people consider advocates to be focused on education, or raising awareness, or even just personally supporting a certain cause in which they believe. PIH Engage means something very specific when we talk about advocacy – we are not so concerned with public education or awareness campaigns, but instead focus on **political action to create change**.

While we recognize the importance of education, we believe in the power of action. It is our responsibility not just to make people *aware* of important issues or problems in global health, but to present them with opportunities to take action in order to solve those problems – and to take those actions ourselves. When we talk about advocacy, we are talking about tangible, measurable action taken in order to change or influence a policy that affects global health, and specifically, the work that Partners In Health carries out. This might mean advocating for more federal funding for global AIDS programs, convincing your Congresspeople to support a bill to strengthen global health systems, or protesting legislation that will restrict access to affordable medicines – or any number of other efforts!

Unlike education or awareness campaigns, PIH Engage **advocacy** campaigns have:

1. Winnable and measurable goals (e.g. passing or defeating a bill)
2. Identifiable targets (e.g. high-powered Congresspeople)
3. A clear timeline (e.g. the federal budget is voted through in September)

We'll spend the year learning and growing together, becoming experts in advocacy. We'll teach you about PIH Engage-led advocacy efforts, and how to bring important information and training to the rest of your team. You'll build relationships with your elected officials, you'll learn how to ask targeted, clear questions about global health, and you'll take tangible, measurable actions to improve access to health care around the world.

### Why do we advocate?

At Partners In Health, we serve communities of marginalized people all around the world – but we can't reach all of them. That's why at PIH Engage, we highlight the importance of political advocacy. Medical service work is incredibly important to treat people who are sick *today*. Building health systems in Rwanda, Haiti, or Peru is incredibly important to make sure that future generations in those communities have reliable access to treatment. But because our work on the ground can only reach the people close to us, we need advocacy to change the policies and structures that affect the access to care for everyone, not just the people in our and our partners' country sites.



### Resources for Your Success

It is critical to remember that you are not alone in this work! You are part of a large network of advocates around the country fighting for health equity, and we have years of experience that we want to share to help you continue this work.

To access team materials, webinars, slides from Training Institute, and information about past fundraising events, go to [engage.pih.org](http://engage.pih.org) and click on the Resources tab. You can access these resources at any time during the year, and you should direct team members to our website so that they can use these tools as well.

Throughout the year, the National Team will also hold webinars and other training sessions that are critical to our campaign, so please keep up to date on emails and RSVP to those events as necessary. Our data shows that teams in regular contact with the National Team through these means are significantly more successful in achieving their fundraising and advocacy goals throughout the year.

As always, if you have any questions or want to check in, your National Team Coach is always available and wants to work with you! That's what we're here for!

## Leading your Advocacy Team

As an Advocacy Lead on your PIH Engage team, you will be responsible for leading a small committee of your peers who are passionate about policy change to plan and execute advocacy actions. While you will need to plan ahead and set long-term goals with your team, your role comes with an extra important challenge: you'll need to be able to build a nimble team that can act quickly, sometimes without much advanced warning, in order to take advantage of pivotal moments in a campaign.

Your role is in large part about *timeliness* – for instance, if the Senate announces that they will vote on an important bill this Thursday, it will not do you much good to visit them next week. We'll provide you with all the resources and training we can to help you understand important global health policy issues, but you'll need to be ready to respond to some last-minute updates.

You and your team are also advocacy ambassadors to your full PIH Engage team. At key moments in each campaign, make sure to pull in every member of your PIH Engage team! For example, if your team is advocating for more cosponsors for a certain bill, your whole team could participate in a call-in day to call and email their member of Congress, but an advocacy team member would be the one to draft an op-ed or schedule a meeting with your Congressperson. One suggestion: for each major PIH Engage advocacy campaign, start by hosting a "learning session" at one of your full-body PIH Engage meetings to teach all your members about the campaign, and ask them to take a quick action at the end of the meeting.

## Setting Goals

Even in moments of quick action, but *especially* at the beginning of a year or campaign, it's incredibly important to start by setting goals with your team. Without setting goals of what you'd like to accomplish, you won't be able to measure your progress or determine what you might need to change to have a successful year. Goals can be *long-term* ("publish 3 op-eds this year"), *short-term* ("turn out 30 people to the rally next week"), *broad* ("build a positive relationship with our Representative") or *specific* ("speak with our Rep's district office at least once a month"). But goals must *always* measurable – you need to be able to know whether or not you've accomplished them! Ideally, your team will create a set of long *and* short-term, broad *and* specific goals.

A note about setting advocacy goals: This process is a bit different than setting fundraising goals, where your team can get completely creative with how they'll reach a certain dollar amount. Within advocacy, there are a certain set of tactics that we simply *know* are more effective at changing policies than others, or are more relevant to a certain campaign. In addition, for your advocacy to be powerful, you need to be amplifying a broader PIH Engage campaign that all other teams are also participating in (for example, supporting a certain bill in Congress). Grassroots advocacy power comes from numbers! So, while your team should definitely set measurable and ambitious goals, work within the PIH Engage campaign and tactics that we know will be most effective.

At the start of your year, set some year-long goals with your team members of what you'd like to accomplish in the realm of political advocacy. You should think big and be ambitious, but set specific plans for how you will accomplish these goals as a team, including some checkpoints and intermediate goals. You can (and should!) get specific when planning for each of your goals; try using the SMART goals worksheet to create more detailed work plans when planning for any particular advocacy action.

### Setting Expectations and Responsibilities

When determining how you will reach your goals, you will need to determine how you will divide responsibilities among your advocacy team. Make sure that every team member plays a meaningful role in your campaign; your role as an Advocacy Lead is not to simply delegate discreet tasks to individual members, but to lead your group in understanding the campaign and helping members take ownership over important pieces of the work.

You will have to pay attention to the various skills and interests of your members, and do your best to make sure that these are in line with their assumed responsibilities. At the beginning of the year, lay out a clear plan for communication – will you use a group text, emails, or Facebook to check in? (Think realistically about how you use any/all of these!) How often will you meet? Where will you meet? Then, create a workplan that details what you plan to accomplish by each meeting, who owns each piece of work, and how you will check in on progress. Expect this to be a working document; change *will* happen, and you will need to adjust often. Setting clear expectations and responsibilities will help you adjust with more ease.

As you work on engaging both old and new members throughout the year, fitting them into your workplan in meaningful ways, check out the “Ladders of Engagement” below.

## Keeping your team members engaged: Ladders of Engagement

Recruiting members and establishing relationships are just the first steps in building up a strong team. It is essential that these relationships continue to grow, enabling individuals to grow as leaders. A ladder of engagement offers a visual representation for this approach, with each rung representing a more progressive action leading to a higher level of engagement. The ladder of engagement is not just a recruiting tool. You and your leadership team should be using this concept for each campaign that takes place throughout the year. It will allow you to see who is expressing interest and showing initiative with respect to the work of the three team leads (Fundraising, Advocacy, and Community Building) and thus incorporate them into the work of those campaigns. And, it will allow you to provide a wide range of ways people can get involved with your PIH Engage team – they can choose which actions matches their level of commitment at that moment in time.



## How to use the PIH Engage Ladder of Engagement

The ladder of engagement offers you a powerful technique in building a strong team. It allows you to identify individuals who are taking initiative and that are willing to commit to a greater level of responsibility. By tracking members through the ladder of engagement you can make tailored “asks,” helping that individual to grow as a leader as well as build the overall team capacity. Below is an example of the ladder of engagement in practice:

- Level 0: individual signs up on the PIH Engage website
- Level 1: individual attends a one-on-one with leadership team member
- Level 2: individual attends team events/fundraisers/etc.
- Level 3: individual is an active member of the team, contributing to planning, and executing team events/fundraisers/etc.
- Level 4: individual is a leadership prospect

## How Do We Advocate?

So how do we actually *do* political advocacy? The following tactics and techniques are some of the most common we'll be employing this year. Keep in mind, these are very *brief overviews* of the types of engagement you'll lead – we'll provide you with plenty more in-depth training on each advocacy tactic throughout the year! *As we repeat throughout this section, make sure that you are always checking in with the PIH Engage National Team when planning advocacy actions to make sure that your messaging is accurate, tailored to your intended target, and consistent with the rest of the network.*

Many of your team members may not have any experience with advocacy, and we won't deny that it can be difficult and intimidating at first! But history has shown that direct advocacy is a vital tool in creating change, and there are many different tactics that different members can employ in our campaigns.

The tactics below are organized into a spectrum to show how members can progress into higher level, more direct advocacy as they move up the Ladders of Engagement on the advocacy team and become more comfortable with advocacy techniques. As the Advocacy Lead, you will be responsible for planning and overseeing all of these types of advocacy throughout the year.

1. **Contacting Congress through phone calls, emails, and letters** can be a great way to garner a great deal of support from those who won't be able to join you for in-person opportunities.
  - **Call-ins** are a tactic best employed when you need immediate mass support for an imminent vote or decision. While not as powerful a relationship-building tool, Congressional offices in D.C. will take notice if they receive a flood of calls in support or opposition of a bill leading up to a vote, for instance. *When planning a call-in, always check with the PIH Engage National Team for help writing an accurate and effective call script (what your team and peers will say when they call).* Additionally, always collect feedback from callers – who they talked to, the response they got, etc. – so that you can track your reach and report back to the rest of the network.
  - **Letters** can also be a good way to gain messages of support from those that might not be able to join you on a legislative visit, but are not always as direct as call-ins. If you have your team or others write letters or emails, be sure to bring those letters, or a count of the number of emails sent, to your in-person meetings to show broad support from constituents who couldn't make it to the meeting.
2. **Speaking through the media to people in power and the public** can be another way to put pressure on your target without going directly to them. You can do this through writing op-eds and letters to the editor (LTEs) in your school or local papers. Unlike most newspaper coverage that is supposed to be unbiased, op-eds and LTEs are your chance to get published

with a strong opinion on a certain issue. Different papers have different publishing rules, so you'll have to check your local paper's rules on word count, submission dates, etc. But no matter your local guidelines, you'll have to work quickly to publish your opinion piece before an issue or your hook is no longer relevant.

When writing an opinion piece, keep your focus tight and be concise – make it very clear where you stand. Write in your individual voice, but also be mindful of what kinds of pieces your paper likes to publish, and what readers like to read. In order to be effective, you'll need to clearly explain why the reader should care about your issue, and you should include a call-to-action near the end of your piece. Whenever possible, tie in a local hook. Don't just think about why this issue is important; think about why this is important to *your readers*.

3. **Speaking with lawmakers face-to-face** is one of the most impactful actions you can take as a global health advocate. Just like with any relationship, relationships with lawmakers and other decision-makers are most powerful when created in person. There are two main face-to-face tactics you'll learn and use this year:

- **Legislative visits: Meeting in your district office or on the Hill**

Your Senators and Representative have offices and personnel dedicated to hearing your concerns. In fact, you are the most important voices for them to hear! After all, you give them power by electing them to represent your interests in Congress; they need to keep hearing about those interests.

You should be meeting with your Congresspeople's local district offices often throughout the year to keep them updated on important global health issues and actions they can take to help. This will help you build a relationship with their office and staff so that your concerns are always top of mind. Always thank them for actions they've taken to help with our issues in the past, and present them with new opportunities (we'll help you determine what these are!). And even if you are not near their D.C. offices (where the real big decisions are made) you can ask that their appropriate D.C. staff person call in whenever you have a local in-district visit.

- **Candidate Engagement: Meeting your legislator on the campaign trail**

Unlike an office visit, during which you'll generally have one-on-one time with a staffer, *candidate engagement provides direct contact with your target*. You can meet with your legislator at rallies, town halls, hearings, or other public events in your area. This can be especially effective when your legislator is running for reelection. Your goal in candidate engagement is to make a direct "ask" and get them to publicly pledge support for your issue.

When you get a decision-maker to pledge their support for your issue in a public setting, you can hold them accountable for their support in the future. Always make

sure that you ask a direct “yes” or “no” question, providing the “right” answer in your question itself (e.g. “will you pledge to raise funding for PEPFAR by \$300 million this next fiscal year?”), and record their answer as accurately as possible – whether that be through video, audio, or verbatim note-taking. *Always contact the PIH Engage National Team immediately for help crafting a question and a plan when you find an opportunity for candidate engagement!*

4. **Direct Actions** are more public events planned by your team that center on a specific target and ask. Planning a demonstration, rally, or vigil, for instance, would be considered a direct action. We don’t expect you to employ this tactic with great frequency, but actions like these can be important rallying points during controversial campaigns, and can earn you crucial media coverage. You will have to be incredibly strategic about every piece of a direct action, from crafting your messaging to recruiting participants to reaching out to press to cover your event. Your whole team will need to contribute to the effort to pull off a successful action!

Direct actions should always include a specific ask directed toward a specific target, but can vary greatly with timely, topical, and regional messaging. Direct actions are often coupled with creative signs, props, and chants – this is your chance to get creative!