



Transforming Policy:

A Guide for Human Service Nonprofits to
Understand and Engage in Advocacy





Contents

I.	Introduction	1
II.	What is Advocacy	2
III.	Understanding Advocacy in Human Services Purpose Guiding Principles Creating Common Language	3
IV.	Strengthening the Sector for Advocacy Advocacy Areas	6
V.	Developing an Advocacy Strategy Advocacy Areas	8
VI.	Implementing Advocacy	10
VII.	Building Relationships with Elected Officials	11
VIII.	Four Ways to Engage in Advocacy	13
IX.	What Not to Do in Advocacy	14
X.	Public Policy & Advocacy Worksheets	15



Introduction

Public policy can play a powerful role in making our community more just. And it can help human service nonprofit organizations make important advances that create lasting, positive and transformative policy change.

Unfortunately, the opposite can be true as well. Public policy can be destructive, harming the community and the lives we are committed to improving.

When it comes to our missions, the impact of changes in public policy is rarely neutral. And - as leaders of our organizations - that means that we cannot be neutral either.

Is there a way to ensure that our public policies are a source of good? The answer is yes - and our human service nonprofit staffs and boards have a key role to play.

We must advocate.

Now this is not about jumping into partisan politics. And it's not about endorsing or opposing political candidates. Human service nonprofit advocacy is about helping those who set public policy understand how the choices they are contemplating - the decisions they are making - will positively or negatively affect the people we serve.

Nonprofit advocacy is about standing for our missions, and this guide seeks to

transform the power of the human service nonprofit sector to advance public good through advocacy.

UPHS has a deep belief in the role of human service nonprofit organizations in identifying public policy solutions and finding common ground.

UPHS provides a single, unified voice for the human services sector in Tallahassee-Leon County. Working together, UPHS effectively addresses critical community needs and ensure necessary supports are available to enhance the delivery of human services.

Advocacy is a year-round commitment, and successful advocacy goes beyond only making contact with your elected officials when it benefits a particular issue/organization.

Through this guide, we seek to equip our members with the skills and leadership that supports, prioritizes and engages in critical advocacy efforts that advance our collective work as a sector. These same principles can be exercised to elevate the work of your organization and any advocacy strategies you deploy to advance your mission.



What is Advocacy

Advocacy can take many forms. In simple terms, it means making the case for your cause or mission. When we talk about advocacy for human service nonprofits, we usually mean making your case in a way that will transform public policy to help your cause. That means reaching audiences in a position to help make those changes.

Advocacy could be any one of a number of things from research and public education to lobbying elected officials and voter engagement. These activities are especially important when you want to make sure that underrepresented and vulnerable communities have a voice in decisions that affect them.

Yet, it is not uncommon for board members and other human service nonprofit leaders to misunderstand the law as it relates to nonprofit engagement in advocacy.

The truth is, as a 501(c)(3) nonprofit organization, you have a legal right to advocate. And when your mission and the people you serve are depending on you, you have a responsibility to do so.

UPHS does suggest that you defer to any funding contracts for restrictions on ways in which you can advocate.

But not all advocacy is the same, and there are some important things to know and understand:

Educate & Inform

Efforts to educate and inform decisionmakers and policy makers, as well as the public, are permissible for all nonprofit organizations. There are no restrictions on the amount of these activities that can be done.

Legislative Lobbying

501(c)(3) public organizations are allowed to work for or against a specific piece of legislation, up to a generous limit.

Elections & Electioneering

Nonprofit organizations may engage in nonpartisan voter registration, education and turnout activities. However, under current law, 501(c)(3) organizations are not allowed to endorse or oppose candidates.

Advocacy At All Levels

If You're an Executive Director/CEO...

Educate yourself about public policy and embed conversations about public or government funding you may receive into your board-level discussions about strategy, funding and organizational impact.

If You're a Board Member

Talk with your Board Chair or Executive Director about how you can be more engaged in advocating for your organization's mission. Ask questions about how public policy could impact your organization and those you serve as part of the conversation around organizational/programmatic strategy.

If You're a Funder

Consider eliminating restrictions in your grant agreements that may prohibit or discourage grantees from engaging in advocacy. Invest in organizations that are building their advocacy capacity or are already successfully leveraging advocacy as an organizational strategy.



Understanding Advocacy in Human Services

UPHS has always been in place to strengthen the human services sector and our neighbors they serve. Public policy is one of the leading ways we serve our members.

Since the formation of UPHS, the goal has always been to be proactive in public policy rather than reactive.

From a policy angle, it is easier to give input on an item before local governments, than it is to repeal it.

UPHS strives in all of its advocacy efforts to share common initiatives among the sector, as well as how policy can have a positive or negative impact on our sector.

Advocacy at UPHS is more than just supporting a cause. Telling our collective story and giving voice to the incredibly important work of the sector helps to influence policies, build relationships with decision makers and positively impact our community.

Whether sharing our collective story, responding to an action alert or meeting with an elected official, our voice matters.

Guiding Principle in UPHS Advocacy

UPHS pursues policy and programs that

promote the human service sector, while increasing our members' ability to meet their mission.

UPHS advocates on behalf of its membership to advance the quality of life for our neighbors, and the principles we follow are as follows:

- All representation will be factual and verifiable;
- Public representation of the human service sector will take place with the consent of the majority of UPHS members. This majority would not preclude any UPHS member from trying to affect change on its own, should an issue affect a UPHS member in a major way;
- Takes no position that requires UPHS to barter its support for any issue(s), person(s) or cause(s);
- Mobilizes public support/opposition only on matters that threaten the existence, viability or integrity of the human service sector and/or its ability to serve our community.

Additionally, UPHS keeps the following elements at the foundation of its work, operationally and through advocacy:

- Human services are a vital link to build human potential and creating thriving communities;
- Human service organizations work to ensure everyone has a foundation of well-being: stable homes, healthy food and reliable healthcare;
- Human service professionals are experts in building well-being;
- Our UPHS Members work to build and support well-being where it is at risk due to systemic inequities.



Creating Common Language for Advocacy

In practice, there are several terms used interchangeably to describe our advocacy work. On the next page, we provide a brief overview of types of advocacy and when to deploy them in action.

Advocacy Involves...

Awareness Building,
Communications and
Media Work

Communication for Behavior
Change

Developing Partnerships/
Coalitions/ Alliances (i.e. UPHS)

Lobbying and Negotiating

Campaigning

Research/Publications

Social Mobilization

Conferences and Events

Particularly when it is geared to...

- Enhancing the human service sector's credibility and legitimacy as an advocate by promoting its public image and visibility;
- Delivering persuasive, evidence-based and solutions-oriented messages to the public, decision makers, stakeholders and those who influence them.
- Creating an enabling environment for effective implementation of policy changes that protect the human service sector's mission and purpose.
- Generating organizational support and momentum behind issues, connecting messengers with decision makers and utilizing diversity to achieve common advocacy goals.
- One-on-one discussions with decision makers to influence them to transform policy, practice or behavior.
- Creating and mobilizing the public around an advocacy issue, changing perceptions and building support to influence decision makers and stakeholders.
- Illustrating the underlying cause(s) and solution(s) to a problem and draw recommendations which can be addressed by decision makers and stakeholders.
- Engaging multiple levels of the community, including those you serve and your board members as allies and partners in overcoming barriers to implementation of programs and initiatives to benefit our community.
- Bringing together a variety of stakeholders and decision makers to highlight the cause(s) and identifying the solution(s) to the issue, with follow-up that includes concrete and immediate action.



Three Critical Elements to Advocacy

Strategy

Understand how the policy environment could impact the work

Build strategies that seize policy opportunities and address policy threats.

Leverage advocacy as a way to get this accomplished..

Budget & Resources

Understand your organization's budget and any public funds that may be vulnerable if public policy shifts.

Prioritize resources to support strategic engagement in advocacy (i.e. coalition membership)

Engagement

Leverage your influence and networks in support of organization's advocacy efforts by making calls, setting up meeting, etc.

Attend meetings with decision makers and stakeholders.

Participate in group advocacy efforts.



Strengthening the Sector for Advocacy

Building and maintaining a foundation for advocacy should be a continuous process, extending through the stages of creating and implementing an advocacy strategy.

Broad recognition and understanding of these areas can advance our capacity for successful advocacy and enhance our ability to respond to (sometimes sudden) changes that can occur during implementation of an advocacy plan.

UPHS already has many of these areas in place for undertaking advocacy; the solutions for how to improve these areas will vary by context.

Advocacy Areas **Credibility**

As an advocate, it is crucial for UPHS and its members that the decision makers and stakeholders trust the organization and value what we have to say.

Skillset

Advocacy is a skill that combines knowledge,

good judgement and creative problem solving.

Building skills for advocacy requires organizational commitment to training, capacity building and leadership development by promoting staffs' ability to engage members, donors, partners and volunteers.

Coordination & Leadership

We are all working toward the same mission - to strengthen the human service sector where each of our members, volunteers, donors, clients and staff is an advocate. Advocates engage in a variety of related activities; and so, advocacy requires strong collaboration between staff members and strong leadership to pave the way forward.

Generate & Communicate Evidence

Evidence for advocacy provides credibility and authority to the organization, allowing us to demonstrate impact, thus garnering decision maker support on an issue(s). Data collection, research, analysis, organization and management provide the basis for solid evidence.

This evidence, however, must also be interpreted and then communicated at the correct time, to the relevant audiences and in its best format, so that the knowledge can be absorbed in a way for the desired impact.

The evidence needs to highlight the issue, the cause(s) of the issue and the solution(s) to the issue.

Ability to Assess Risks

There are risks in conducting advocacy, as well as risks in choosing not to undertake advocacy. Either path can affect UPHS and its members' credibility and authority.



As an organization, we evaluate the risks of conducting advocacy and the potential gains versus the risks of not conducting advocacy and the potential losses.

Partners and Networks that form a Broad Base for Advocacy

The ability to build relationships (personal, public and institutional) is very important for effective advocacy.

Good relationships allow organizations to reach target audiences or overcome gaps by connecting with influential secondary audiences, as well as generating critical mass behind cause(s) and issue(s) that advance our priorities. Building such relationships requires understanding the dynamics of power and having the capacity to engage audiences through multiple platforms and forums.

As a relationship is nurtured, people will respond and provide support to you, but you should be prepared to respond in a timely and diligent way.

Reciprocity, responsiveness and responsibility strengthens, builds and sustains partnerships.

Sufficient Resources

Advocacy is resource intensive. It requires investment of funds, staff time and materials over an extended period of time. Resource availability often changes the shape of an advocacy strategy and how it is planned.

Therefore, it is essential to know the likelihood of what resources will be available for an advocacy issue at the outset.

Advocacy is the top practice of high-performing nonprofits

The secret to success lies in how great organizations mobilize every sector of society - government, business, nonprofits, and the public - to be a force for good.

In other words, greatness has more to do with how nonprofits work outside the boundaries of their organizations than how they manage their own internal operations.

High-impact nonprofit organizations don't just focus on doing one thing well; they incorporate a multi-faceted approach and advocacy is at the core.

They may start out providing great programs, but eventually they realize that they cannot achieve systemic change through service delivery alone. So they add policy advocacy to access government resources or to change legislation, thus expanding their impact.

Other nonprofits start out doing advocacy and later add grassroots programs to supercharge their strategy.

Ultimately, all of them bridge the divide between service and advocacy, and become good at doing both.



Developing an Advocacy Strategy

Why Develop an Advocacy Strategy?

Strategic advocacy is the backbone of effective advocacy. It is a disciplined effort to generate fundamental decisions and actions that guide an organization and shape its course for a specific issue. Planning is indispensable and outlined are some of the reasons why:

- Planning helps put resources (time, funds, skills) to their most effective use;
- Planning helps minimize risks and maximize opportunities for advocacy;
- Planning helps align advocacy with other areas of work and organizational goals, both long-term and short-term.

Developing an advocacy strategy entails figuring out how to reach interim outcomes while keeping the long-term vision alive. A good strategy can be applied to a quick initiative or long-term approach, but it always creates opportunities to

advance efforts and protect gains.

The Benefits of Partnerships for Strengthening Advocacy

Advocacy efforts must invest time in build relationships, because creating a constituency is the key to success. Relationships are a crucial way of adding strength to advocacy work and can develop potential allies to strengthen a joint call to action.

In Tallahassee-Leon County, UPHS works with a wide range of partners to achieve our advocacy results.

As a partner in advocacy processes, UPHS may have the role of an observer or convener, depending on the context. As an observer, UPHS monitors the impact of policy and advocacy on the human services sector, helps provide a platform so that the voices of its members can be heard and constantly promoting the best interests of the sector.

In its convening role, UPHS coordinated advocacy campaigns, mobilizes partners, members and stakeholders behind an issue, helps garner resource mobilization, technical assistance, provides policy expertise and essential information.

Different Ways to Create Partnerships

Putting relationships together requires creativity and leadership.

Networks

Networks have the advantage of creating free spaces that enables ideas, proposal and



experiments to emerge. With electronic communication, they can create communities of practice that lead to collaboration without the costs and time of travel.

Networks even when structured lack the formal decision-making that leads to accountability within organizations or between them.

Their purpose is to introduce the power of ideas and practice that may lead to a more intentional effort at building advocacy strength, which in turn, may advance a variety of initiatives affecting the human services landscape.

Alliances

Alliances are formed around a common issue. They will vary from loosely to highly structured. The participants in an alliance may disagree on some issues or have different priorities. Alliances are rarely permanent, but a new alliance can be formed at various stages. After a policy is changed, for example, attention can focus on implementation and next steps to further advance the effort may include forming an implementation alliance.

Alliances can demonstrate power in their aggregate, and unlikely alliances can create greater power. Decision makers pay attention to such alliances; they suggest that different perspectives support a common objective.

Coalitions (UPHS is a coalition)

Coalitions, like alliances, work on joint actions. As a rule, coalitions are more formal and have a decision-making process. The

structure may well include staff which provide the driving leadership of the coalition. Advantages for coalition member include essential ingredients of advocacy:

- Members are likely to receive information they otherwise would not have;
- Through connections, they may gain access to decision makers they would normally have difficulty getting.



Implementing Advocacy

UPHS, its members, their staff, volunteers, donors and clients have the potential to be huge contributors to social change.

UPHS and its members must commit to being proactive, communicative and engaged in the advocacy process. Here are a few of the ways and steps UPHS advocates for the human services sector:

Advocacy Committee

UPHS has an established Advocacy Committee comprised of staff, board members, members and community partners that review local policy and ordinances that affect the human services sector and establish a recommended response when needed.

Knowing Your Elected Officials

UPHS works closely with local elected officials in Tallahassee-Leon County to establish relationships with them and their staff as a constant opportunity to build awareness and educate them on the value and impact of the human services sector.

It is essential that these relationships be forged, not only at UPHS, but also at the member and board/volunteer level to navigate future policy issues affecting our sector. We will expand more on this in Section 5.

Survey Relationships

Survey UPHS Members, Stakeholders and key staff to understand who has a previous relationship with any of our local elected officials.

Develop Priorities and Create Materials

UPHS gathers facts and evidence-based

data, develops talking points and fact sheets, as well as reviews and refines annual reports and other materials specific to advancing the work of the human services sector.

On-Going and As-Needed Policy Visits

UPHS connects with local elected officials at least once per quarter (if not more frequently) to keep them updated on the human services sector and important trends/issues that may be addressed at the policy level.

For maximum effectiveness, it is important for UPHS to involve its Board and Committees and UPHS Members and their board members in these meetings.

Follow-Up

UPHS will always post pictures and thank elected officials publicly for their time, as well as follow-up with a handwritten note. Additional ways UPHS can/will follow-up and encourages its members to do the same includes:

- Provide any follow up items/next steps as discussed or as needed;
- Invite elected officials and/or staff for a site visit. This is critical when demonstrating the effectiveness of programs/initiatives to see the work of the human services sector in action.

In addition to these items, add elected officials, their aides and staff to communications (i.e. distribution of newsletter, annual report and event invitations, etc.).



Building Relationships with Elected Officials

Why Engage Elected Officials and Staff

Elected and public officials make decisions that influence things that happen inside the human services sector and things that affect the individuals and families our UPHS Members serve.

UPHS and its members serve as the experts on these issues and community needs. Elected and public officials both want and need to hear from their constituents; without that communication, they will not have all the information they may need to make the best decisions.

Reaching out to the official and their staff regularly ensures that you are in control of your own story, rather than letting others tell it for you. Additionally, an important aspect of knowing your elected officials, which is often overlooked, is staff relations. Elected officials rely on their staff members for a variety of tasks from scheduling to policy advising.

Because of this, establishing communication with staff members will allow you to have the relationship necessary to make asks. The best way to cultivate staff relationships is to communicate often and when needed, keep your word and credibility and follow up when asked.

We have developed a [Relationship Evaluation Worksheet](#) (page 14) in order to help you assess your relationships. Thanks to the impact and reach of the human services sector, it is often easy to find a connection with either an elected official or staff member. Leveraging these relationships and ensuring that we continue to engage them will go a long

way when making asks of the sector.

Before the Meeting

Choosing the Meeting Participants

Choose the meeting participants carefully for maximum impact. Remember, too large of a group can be counterproductive.

Initial Contact and Scheduling

Submit a meeting request to the elected official's office by email and follow-up with a phone call. In the email, include what you would like to discuss and the names and titles of those planning to participate in the meeting.

Typically, offices receive requests two-to-three weeks out from the desired meeting date.

Prepping for the Meeting

Once the meeting is scheduled, brief meeting participants to ensure everyone is clear about the goals and purpose before the meeting. Average meetings last 30-45 minutes, so a clear plan will help maximize the time available. We have developed a [Meeting Worksheet](#) (page 15) to help you prep and maximize your time in the meeting.

Bring informational materials to leave behind with the elected officials and staff. Be sure your contact information is easy to find. Examples of materials to bring to the meeting could include:

- Social and Economic Impact of Human Services Sector/Organization-specific document;
- One-pager outlining programs, initiatives and outcomes;
- Annual report or other data-specific information;
- Business cards.



During the Meeting

Once the meeting is set and you have completed your prep work, it's important to understand the importance of staying on task during the meeting. Below is a brief outline of some rules UPHS follows and encourage its Members to follow as well:

- Be prompt and patient. Elected officials run on very tight schedules; be sure to arrive on time, but know it is not uncommon for an elected official to be late or have your meeting interrupted with other business;
- Keep it short and focused. You will have limited time during your meeting, ensure that you stick to the topic at hand;
- Start the meeting by introducing everyone and thanking the elected official for any support they have provided for the human services sector and for taking the time to meet;
- Know and understand the policy you are speaking about; you do not need to be an expert, but be knowledgeable and a resource;
- Provide examples of the impact any policy issues will or has had on the sector/organization;
- If additional information is needed, provide a clear timeline as to when it can be provided.

everyone in your group to understand what the elected official committed to do (if anything) and what follow-up information was committed to being sent. Each person who took part in the meeting should promptly send a thank you note.

Note: Under Florida law, any elected official and their staff cannot accept gifts, food or beverages from any organization/advocacy group. Gifts include anything from a candy to a branded mug.

After the Meeting

Right after the meeting, compare notes with



Four Ways to Engage in Advocacy

1 Inform & Activate Your Network

Help inform and activate your organization's network in support of important policy issues.

When this Approach is Most Impactful

Any time there are public policy decisions that could positively (or negatively) affect the human services sector, your organization and the people and communities we serve. Even if your organization does not have its own policy expert, you can activate your network by tapping into insights and strategy from coalitions like UPHS or other organizations with similar missions or priorities.

UPHS Members' Unique Value

- Helping to elevate the visibility of these efforts by leveraging members' personal influence and networks;
- Serving as unified voice, particularly on issues that may be perceived as controversial or having collective adverse implications on the human services sector.

2 Research Impact on Policy Issues

Analyzing how specific policy issues impact (or would impact) the community you serve.

When this Approach is Most Impactful

When a set of issues needs to be better understood or documented in a way that create a compelling case for public policy change.

UPHS Members' Unique Value

- Supporting the investment in research as part of program evaluation process;

- Helping to identify and connect with donors/partners willing to underwrite research that benefits the human services sector.

3 Educate Policymakers and the Public

Educating policymakers (and/or the general public and media) about how an issue or policy is impacting or would impact the people and communities we serve.

When this Approach is Most Impactful

When there is a clear case for a public policy change, but decision makers are not necessarily well informed about the issue(s) or impact on the community.

UPHS Members' Unique Value

- Leveraging personal networks and influence to reach decision makers (for meetings, conversations, etc.);
- Serving as an influential "community voice" in conversations with decision makers.

4 Join Forces to Create a Collective Voice

Bringing community leaders together to jointly identify community needs and challenges while building shared priorities for public policy change.

When this Approach is Most Impactful

When broad buy-in is necessary or helpful in establishing priorities and a shared strategy. A collective voice equates to more influence and power.

UPHS Members' Unique Value

- Connecting with community leaders and organizations with diverse spheres of influence;
- Overcoming the challenging power dynamics that may exist between organizations.



What NOT to Do in Advocacy

Just like there are successful ways to advocate, UPHS and its members must be mindful of what not to do as well. We have listed some common mistakes that derail advocacy efforts altogether.

What to Avoid in Advocacy

- Do NOT overload an advocacy visit with too many issues. One to two issues are as much as you should cover in one letter, communication or visit.
- Do NOT overstate your case. Be concise and succinct or you are apt to lose the attention of the decision maker.
- Do NOT be argumentative, defamatory or derogatory toward a decision makers' views, voting history or previous policy direction.
 - Always utilize your time with a decision maker to educate them on your cause/issue and to understand how your position is in the best interest of the collective.
- Do NOT be confrontational in your position or ask.
- Do NOT make promises you cannot deliver.
- Do NOT be afraid to take a stand on issues, even if your position differs from a decision maker.
- Do NOT use jargon, acronyms or internal language. Speak as if the decision maker has limited understanding of your work, mission and goals.
- Do NOT shy away from meeting with decision makers whose views differ from yours or the issue at hand. Education and relationship building is key.
- Do NOT only meet with decision makers when you need something.

Specific Actions

- Do NOT use form letters. Form letters are not taken seriously and are interpreted as the action of a single person, rather than a collective effort.
- Do NOT underestimate the value of individualized letters, emails and phone calls. Many decision makers' offices multiply each letter, email or phone call received by 50 (i.e. 200 are counted as 10,000). Fifty letters, emails or phone calls on any issue is considered an avalanche of public support/opposition.
- Do NOT ignore an opportunity to visit with decision makers.
- Do NOT wait until the day of policy discussion/decisions to state your case.
 - Efforts should be ongoing, and waiting until the last minute to prioritize your issue(s)/cause reflects poorly with decision makers.

Cardinal Rules of UPHS Advocacy

- Do NOT publicly and/or privately generate content that is directed toward UPHS or its members that is defamatory, offensive, or derogatory in nature.
 - Any defamatory, offensive, or derogatory communication directed toward Corporation or its members, colleagues, contractors, partners, funders or stakeholders may be considered as a violation of the Corporation's anti-harassment policy.
- Do NOT damage political relationships with decision makers.,



Public Policy & Advocacy Worksheets



Relationship Evaluation Worksheet

Determining where a public officials network intersects with UPHS and its members is a vital step in building relationships and engaging that elected official. This document is a guide that will allow you, your staff and board to understand your elected official in more in-depth and is for you to keep and update through your relationship building with each elected official.

Your Information

Name: _____
Title: _____
Organization: _____

Elected Official

Name: _____
Seat: _____

I know this elected official (select one):

- **Very Well** I consider this individual a personal friend
- **Well** We know each other on a first name basis
- **Somewhat** Don't know this individual personally, but they have been supportive of UPHS/Organization
- **Not At All** Willing to get to know this individual

Policy Connections

Is this individual passionate about the human services sector or any issues that relate to our organization?

UPHS/Organization Connections

Is this individual a member or donor? Volunteer? Board Member? Any past service? Do they have a relationship with any staff members?

Personal/Professional Relationships

These may be connections you personally or someone else have with this individual. Engage board, staff, volunteers and donors in identifying relationships that exist.



Meeting Worksheet

Most meetings you schedule with members or staffers will last between 30-45 minutes. We want to make sure we utilize this time to best advance the human services sector/issue(s) at hand.

Description	Time	Activity
Small Talk	3-5 minutes	The interaction that takes place at the beginning while transitioning to an office/meeting space.
Why?	5-7 minutes	Explain why you are there. Usually, it is something along the lines of <i>"we are advocating on behalf of the 44k people served locally by the human services sector."</i> This is the time to tell your story.
Discuss & Educate	5-10 minutes	This is where you begin to discuss the priorities and educate the official and staff on those priorities. A tool to start this conversation is a leave behind or one-pager for a specific topic. This section should take up the majority of the meeting.
Ask	1-2 minutes	This is where you ask for support of the human services sector and its priorities/issue(s) at hand. Using phrases like <i>"Your support allows UPHS and its members to enhance the delivery of human services through proven, evidence-based programs."</i> This is also where you should ask if there is anything else you can provide to the official to serve as a resource for them.
Thank You	2 minutes	Thank the official and staff for their time and for what they do for the community. Ask to take a picture to post to social media. A social media post goes a long way and allows the human services sector to be elevated, along with UPHS, its members and the elected official.
Follow-up, Relationship Building & Active Engagement	Immediately after meeting, Ongoing and long-term	Follow-up is one of the most important jobs of an advocate. This established credibility and begins the long-term relationship with the elected official and their staff. Long-term engagement is key to keeping the relationship strong.



Planning for the Meeting

Most meetings will have 1-3 people in attendance (not including the elected official and their staff). It is important for the group to clarify who will take the lead and who will stress particular points of the conversation. Questions to ask yourself when planning include:

- Who will open the meeting?
- Who will share specific data, research and other information?
- Who will share a compelling personal story?
- Who will ask for the elected officials support for the issue at hand?
- Who will ask about next steps?
- Who will be responsible for follow up?
- Who will take and post photos to social media?

Your Information

Name: _____
Title: _____
Organization: _____

Elected Official

Name: _____
Seat: _____

Reason for Meeting:

Previous Interactions:

What are their policy priorities?

Who is attending the meeting?

What follow-up is needed?

