National Alliance to End Homelessness

Using Advocacy to End Homelessness:

A Toolkit for Understanding and Conducting Advocacy

National Alliance to
END HOMELESSNESS

The National Alliance to End Homelessness is a non-partisan, mission-driven organization committed to preventing and ending homelessness in the United States. The Alliance is a leading voice on the issue of homelessness. The Alliance analyzes policy and develops pragmatic, cost-effective policy solutions. The Alliance works collaboratively with the public, private, and nonprofit sectors to build state and local capacity, leading to stronger programs and policies that help communities achieve their goal of ending homelessness. We provide data and research to policymakers and elected officials in order to inform policy debates and educate the public and opinion leaders nationwide.

Table of Contents

Introduction

Advocacy can be one of the most powerful ways to impact public policy. However, advocacy can seem overwhelming, and there is a lot of confusion about what advocacy is and how to do it. This toolkit is designed to dispel any myths or confusion you may have about advocacy and to provide you with all of the tools that you need to advocate to make preventing and ending homelessness a federal priority. Through advocacy, we can work with policymakers to provide new and increased resources so that no man, woman, or child in the United States experiences homelessness.

What is Advocacy?

Advocacy is the active support of an idea or cause. It can take a wide array of forms, ranging from basic education about the importance of an issue to direct lobbying about a specific piece of legislation where you ask a policymaker to take a specific action. Advocacy can include a variety of activities, such as meetings, letters, phone calls, site visits, mobilizing others, and more. The target audience for advocacy efforts is also wide-ranging; federal, state, and local policymakers and other key decisionmakers all can be targets.

This toolkit will focus specifically on advocacy to federal policymakers. However, all of the strategies described in this toolkit that apply to federal policymakers can be used on any other elected official or decisionmaker.

Why Does Advocacy Matter?

The homelessness assistance system in your community likely relies on federal resources to operate. Key federal programs like the McKinney-Vento Homeless Assistance Grants, Runaway and Homeless Youth Act, joint U.S. Departments of Housing and Urban Development (HUD) and Veterans Affairs (VA) Supportive Housing (HUD-VASH) vouchers, and countless other resources all come from federal programs. As a result, federal funding and programs are integral to efforts by your community and organization to prevent and end homelessness.

By encouraging policymakers to take action, advocacy can be extremely effective at making change. On countless occasions, legislators have stated initially that they could not take a specific step or support a specific program until advocates stepped in and worked to change their minds. Over the years, advocates have made a large impact on federal policy to prevent and end homelessness.

You can better achieve your organization's mission and improve your community's success at ending homelessness if you have improved access to federal resources. **Advocacy helps us to gain new and increased resources for preventing and ending homelessness.**

Why Should YOU Do Advocacy?

Not only is advocacy an important part of the nation's collective effort to prevent and end homelessness, it also represents an important aspect of the work you do to accomplish those goals. As a constituent, your voice matters; it is the job of elected officials to listen to their constituents and work to address their needs. Members of Congress are most interested in what their own constituents have to say, so try to focus your advocacy efforts on your own representatives and senators. If constituents do not tell federal policymakers why it is important to make ending homelessness a federal priority, policymakers may never know they need to do so. Just as it is their job to listen to you, it is your job to tell them what your community needs.

As someone who is involved in the homelessness assistance world, **you are a critical part of advocacy efforts to secure new and increased resources for ending homelessness**. If you work in this field on a daily basis, you are well aware of the challenges that your community is facing and what it could do with additional resources or new or improved programs. **It is up to you to communicate those needs to policymakers**. They rely on constituents to understand which issues represent a priority for their community.

What Is in This Toolkit?

This toolkit is designed to help you understand advocacy and the federal policymaking process, as well as to provide you with all of the tools that you need to take action. It is expected that most readers will not read the entire toolkit from beginning to end; rather, most people will skim through all of the chapters to see what information is available and then utilize specific sections as appropriate.

The toolkit begins with two chapters filled with background information: "Knowing the Rules for Nonprofit Lobbying" and "Understanding the Policymaking Process." These chapters will provide you with some basic information about the difference between lobbying and advocacy and an understanding of how Congress functions and how bills are enacted into federal policy.

Following these chapters is a section entitled "Developing a Strategic Advocacy Plan," which will provide useful suggestions for mapping out your organization's advocacy efforts and developing a longer term strategy and a set of goals for your advocacy efforts.

The next several chapters are some of the most important, as they detail specific strategies that you can use in your advocacy efforts. These chapters include "Using Everyday Communications to Build Congressional Relationships," "Achieving Effective Site Visits," "Conducting Successful Congressional Meetings," and "Engaging the Media." These are some of the most important strategies that you might implement to educate your Members of Congress, advocate to them regarding various issues, and lobby them to take specific actions on key pieces of federal legislation.

The last two chapters in this toolkit, "Mobilizing Others" and "Mobilizing through Social Media," focus on strategies for getting others to advocate. These actions involve taking advocacy one step further by trying to get others involved. Mobilizing other stakeholders and constituents can be one of the most effective ways to create change. **Multiple voices are always louder than one.**

The end of the toolkit includes a list of additional resources that may be helpful.

> Each section in this toolkit includes an overview as to why that particular strategy is important to understand and can be an effective tool. Each chapter then provides a set of step-by-step directions and suggestions you should consider when using that strategy. Information in boxes is of particular importance, and helpful tips to make your job easier also are included. Each strategy chapter concludes by providing a number of sample tools and often real-life examples of those tools for you to use as guides in your own efforts.

Please note that this toolkit has been created to be a fairly comprehensive set of directions for approaching advocacy. It is structured so as to include *all* of the steps and details that you might want to consider. As a result, each strategy may at first seem a little overwhelming to undertake, but remember that they do not have to be. This toolkit provides nearly every piece of information you might need.

> If you have any questions at all about advocacy or the information contained in the toolkit, please do not hesitate to contact the Alliance. Staff members are available to assist you every step of the way as you strategize about your organization's advocacy efforts.

Using this toolkit will help you to build strong, lasting relationships with your Members of Congress. These relationships, in turn, can result in making it a federal priority to end homelessness in the United States once and for all.

Knowing the Rules for Nonprofit Lobbying

Please note that the information in this section comes from The Nonprofit Lobbying Guide by Bob Smucker (second edition, 1999) and the Internal Revenue Service's website.

Nonprofit lobbying is designed to instigate policy change. Staff members at nonprofit organizations have a unique perspective about the needs of the people they serve, making them skilled problem-solvers who play a valuable role in shaping public policy. Unfortunately, myths about lobbying and advocacy prevent many nonprofit organizations from taking part in the public policy process. Contrary to what many people think, not only is nonprofit lobbying legal, Congress has recognized that lobbying efforts by nonprofit organizations represent a legitimate and important activity.

Because nonprofit organizations have such expertise on the issue of homelessness, who it affects, its causes, and its solutions, it is imperative that they be involved in the federal policy process and help to shape public policy. The only way to achieve this type of involvement is through advocacy and lobbying. As a result, you and your organization have a key role to play. Unfortunately, the rules and regulations governing lobbying can seem confusing and overwhelming to many people. This section of the toolkit is designed to help nonprofit organizations, designated as 501(c)(3) organizations by the Internal Revenue Service (IRS), understand what constitutes lobbying and how to measure and report on lobbying activities.

Lobbying vs. Advocacy

Lobbying and advocacy are commonly confused with each other. One thing to keep in mind is that lobbying is a type of advocacy, but advocacy activities are not always lobbying.

It is very important to know the difference between lobbying and advocacy so that you can properly report activities and expenditures. **There is no federal limit on how much non-lobbying advocacy your nonprofit organization can do.**

According to the IRS, which oversees lobbying activities, **lobbying involves an attempt to influence *specific* legislation** at the local, state, or federal level. Lobbying activities include contacting any legislative Member, legislative staff, or government employee to influence him or her to propose, support, or oppose specific legislation, as well as trying to persuade the public to share your views on a particular legislative proposal. There are two main types of advocacy: non-lobbying advocacy and lobbying.

LOBBYING ACTIVITIES MAY INCLUDE THE FOLLOWING:

- Meeting with members of the Appropriations Committee in Washington, DC to ask them to support a proposed increase in funding for a specific federal program, such as the McKinney-Vento program;
- Calling congressional staff to ask a Member of Congress (Member) to write a letter to the chair of a key committee in support of passage of a specific bill; and
- Sending out an action alert to a coalition of homeless service providers asking recipients to write to their Member in support of a proposed increase in funding for a specific federal program.

Advocacy, however, is focused on education about a specific issue on behalf of the people your organization serves.

Lobbying is a small portion of the total amount of advocacy efforts made by many nonprofits. Most lobbying efforts are successful only when they are coupled with many other advocacy activities that allow policymakers to make informed decisions.

Many homelessness assistance programs rely on funding through numerous federal programs. In order to increase the amount and type of federal resources available, they work year-round on both lobbying efforts and non-lobbying advocacy efforts on behalf of the individuals they serve.

NON-LOBBYING ADVOCACY ACTIVITIES INCLUDE THE FOLLOWING:

- Distributing materials to congressional offices that describe the success of a federally funded program;
- Disseminating an analysis of a specific piece of legislation on your website or elsewhere with details of how it would affect people experiencing or at risk of homelessness;
- Inviting Members to visit a program so they can see first-hand how federal funding is used to end homelessness;
- Sharing with congressional offices how your organization uses federal funding and what it is able to accomplish with that funding; and
- Meeting with Members or their staff in response to a written request for technical assistance from a congressional body to provide information on how a particular piece of legislation will affect homeless people and local programs.

> Providing technical assistance or advice in response to official written questions or inquiries from a congressional body (committee or subcommittee) is not considered lobbying, even if they ask for your position on a particular piece of legislation. For example, if the Senate Banking, Housing, and Urban Affairs Committee requests that your organization submit written or oral testimony about the impact of a piece of legislation on homelessness, that testimony will not constitute lobbying. However, responses to informal requests from the offices of Members of Congress are considered lobbying activities if you take a position on the legislation.

Determining Lobbying Limits

While lobbying is an important activity for nonprofit organizations to undertake, federal tax law places limits on the amount of lobbying that an organization can do.

There are two main ways in which tax-exempt organizations can determine lobbying limits. The descriptions of each option below can help you assess which one might be the best fit for your organization. More information on both options can be found on the IRS website at http://www.irs.gov/charities/article/0,,id=163394,00.html.

Making an informed decision about which federal tax law your organization should use to track lobbying activities will help you to better understand what constraints and limits your organization must abide by in lobbying.

OPTION ONE: "SUBSTANTIAL PART" TEST

Unless a nonprofit organization specifically elects to fall under different lobbying regulations, it must abide by federal tax law, which requires that no "substantial part" of a 501(c)(3) organization's overall activities consists of lobbying. This is commonly called the **substantial part test**.

The substantial part test **measures both your organization's time and expenditures** devoted to lobbying on behalf of your mission. This includes time and expenditures by both paid and volunteer workers. Unfortunately, the IRS has not been clear about defining how much time and money spent lobbying counts as "substantial."

TIP

A common rule suggested by some lawyers and practitioners for organizations operating under this option is to **limit lobbying activities to 5 percent** of the organization's total amount of activities. However, be aware that the IRS has not officially backed the 5-percent rule.

This amount may seem small, but many organizations choose this option because their lobbying activities are very few compared to the many activities that serve other functions of the organization. After recognizing the difference between advocacy and lobbying, you may find that the amount of time and money your organization actually spends on lobbying is extremely insignificant.

OPTION TWO: 501(H) EXPENDITURE TEST

Federal law gives nonprofit organizations a second method for determining limits on their lobbying activity. Unlike the somewhat vague substantial part test, the 501(h) law gives 501(c)(3) organizations the right to lobby with the security of knowing the very specific limitations they face for lobbying expenditures. By filing with the IRS, you can elect to fall under this law; in that case, your organization's lobbying limits are based solely on expenditures.

This option is widely known as the **501(h) expenditure test** and allows your organization to take part in a significant amount of lobbying under the guidance of precise regulations for calculating lobbying limits. Under this option, lobbying limits are calculated **based solely on how much money your organization spends on lobbying**; under this option, **the *time* your organization spends on lobbying activities is not factored in.**

Under the 501(h) expenditure test, if an activity does not cost anything, it does not count toward lobbying limits. For example, staff time costs the organization money and would be factored into the total allowance due to salary costs, whereas a volunteer's time would not be, because it does not cost anything.

The 501(h) expenditure test distinguishes between direct and grassroots lobbying activities. Organizations can spend as much as **20 percent of their entire budget on lobbying** (including direct lobbying, where you are the one taking action), and up to a **quarter of that total amount can be spent specifically on grassroots lobbying** (when you ask the public to take action).

TIP

An organization can elect to fall under the 501(h) expenditure test by filling out the IRS Form 5768, which is available at http://www.irs.gov/pub/irs-pdf/f5768.pdf.

Under the 501(h) expenditure test, the limit on lobbying expenditures is based on the size of the organization and cannot exceed $1 million total. The table below indicates the IRS' guidelines on lobbying limits under this option.

EXEMPT-PURPOSE EXPENDITURE	NONTAXABLE LOBBYING AMOUNT
Less than $500,000	20 percent of exempt-purpose expenditures
Between $500,000 and $1 million	$100,000, plus 15 percent of the excess of the exempt-purpose expenditures over $500,000
Between $1 million and $1.5 million	$175,000, plus 10 percent of the exempt-purpose expenditures over $1,000,000
More than $1.5 million	$225,000, plus 5 percent of the exempt-purpose expenditures over $1,500,000

Using this option, a 501(c)(3) organization with an annual budget of, for example, $600,000 could spend up to $115,000 on lobbying activities each year ($100,000 for the first $500,000 of the organization's budget, plus 15 percent of the remaining $100,000 of the budget). Up to $28,750 of that (25 percent of $115,000) could be for grassroots lobbying.

“Dos and Don’ts” of Lobbying

Below are a few key things that nonprofit organizations should and should not do in regards to lobbying and advocacy.

DO:

- DO advocate. There are no limits on non-lobbying advocacy activities.
- DO lobby. Nonprofit organizations have a unique perspective and experience on the issue of homelessness, and they play a valuable role in shaping federal policy.
- DO determine how to measure your organization’s lobbying activities. Decide whether the substantial part or 501(h) expenditure test is best for your organization. This will depend on how much time and money your organization spends on lobbying activities.
- DO talk with all of your funders. Public and private foundations can fund lobbying projects but must follow certain rules. Each funder, including government entities, may also operate under more stringent rules than are required by the federal government. Talk with your funders and visit the Alliance for Justice at www.afj.org for more information on foundation advocacy.
- DO conduct voter registration and “get out the vote” activities. People experiencing homelessness often have trouble registering to vote because they may not be familiar with the process or have the necessary documentation easily available. “Get out the vote” and voter registration activities do not count as lobbying, as long as your organization does not participate in a campaign for or against a specific candidate.
- DO work with the Alliance year-round on advocacy and lobbying campaigns.

DON’T:

- DON’T think lobbying can be done only by professional lobbyists. Your lobbying activity can help result in better policy, making it easier for your organization to achieve its mission.
- DON’T use federal funds for lobbying at the state or federal level. A local funding match cannot be used for lobbying purposes either.
- DON’T ever participate as an organization in any political campaign on behalf of or in opposition to any candidate for public office. As a private citizen on your own time, you are perfectly within your rights to participate in such a campaign, as long as you are not representing your organization.

Because policymakers rely on 501(c)(3) organizations’ expertise to make decisions about policy, you can and should lobby. You should make informed decisions about how your organization is tracking its lobbying and advocacy activities and seek training about lobbying rules and regulations. Use the information in this section to help you begin to make these decisions.

Lobbying is not just asking your Members for increased funding or pushing for certain pieces of legislation; lobbying is educating. Members deal with hundreds of different topics, both domestically and internationally. **You are the expert**, and your congressional offices are looking to you, as a constituent, to inform them on the important issue of homelessness in their states and districts.

TIP

For more information on lobbying rules and regulations for nonprofit organizations, read *The Nonprofit Lobbying Guide* (second edition) by Bob Smucker, or contact the Center for Lobbying in the Public Interest at www.clpi.org and the Alliance for Justice at www.afj.org.

A Note about Lobbying Limits for Government Employees

Federal law prohibits employees of the federal government from lobbying as representatives of the agency for which they work, though nothing prohibits federal employees from lobbying as private citizens. Lobbying regulations for state and local government employees vary by locality.

TIP

If you are an employee of a state or local government, you should check with your supervisors to find out what, if any, lobbying restrictions you face. The Alliance can help you determine what limits exist for your state or community.

Remember These Five Steps for Success

- Understand the difference between advocacy and lobbying.
- Assess whether the substantial part test or 501(h) expenditure test is the best way for your organization to measure lobbying activity.
- Use advocacy and lobbying to work with federal policymakers to improve federal homelessness policy.
- Track your lobbying and advocacy activities.
- Work with the Alliance on your lobbying and advocacy efforts.

Understanding the Policymaking Process

Having a basic understanding of the legislative process is key to effective lobbying and advocacy. This section will cover some of the legislative basics, including key committees and staff positions, how an idea is turned into federal policy, the appropriations process, and common terminology. This information will help you to understand the legislative process so that you can more effectively impact it.

See *The Policymaking Process: Key Legislative Terms* (page 17)

This toolkit will focus primarily on the legislative portion of policymaking. However, it is important to remember that legislation generally does not cover every detail of the bill's execution. Instead, bills passed into law are seen as more of a guide or outline; it is up to the executive branch (the administration, federal departments, and agencies) to fill in the details.

Structure of Congress

To understand the basics of how an idea is turned into federal policy, it is necessary to first understand how Congress is structured. At its most basic level, Congress is divided into an upper and lower chamber, the Senate and House of Representatives, respectively. The Senate is composed of 100 Members, with each state contributing two senators, while the House is composed of 435 voting Members, with each state contributing representatives based on their population. Senators serve for six-year terms, and representatives in the House serve two-year terms.

Almost all Members of Congress (Members) identify with either the Republican or Democratic Parties. Those who identify as independents often affiliate themselves with either party once in office. The party that holds a majority in either chamber is referred to as the majority party.

CONGRESSIONAL COMMITTEES

The Senate and the House of Representatives ("the House") have similar structures. Both of the chambers are divided into committees designed to address specific issues. Every topic within the federal government's purview is addressed by a specific committee. Committees cover a wide range of topics, ensuring that Congress has oversight and authority over the full array of legislative issues. Committees are designed to split up these vast policy areas into similar and more easily managed groupings.

More specifically, most committees have subcommittees, which are designed to break up the issues into even smaller focus areas. Whereas a committee that covers health, education, and labor will have a large variety of topics to deal with, the subcommittee on children and families will be more specific and focused in the legislation that it considers. Legislation that is created at the subcommittee level must be approved by the full committee before being passed on to the House or Senate floor for consideration by the entire chamber.

When Members are sworn into office, Senate or House leaders usually place them on committees in which they or their constituents have an interest. The number of committees or subcommittees a Member sits on varies in each chamber, but they are generally involved in multiple committees and several subcommittees.

Even though all Members vote on all of the legislation that comes to the chamber floor, regardless of their committee assignments, the committee structure means that certain Members have much more influence in shaping specific pieces of legislation than others.

The following committees often consider legislation related to homeless or at-risk individuals and families:

- Committee on Appropriations
  - Subcommittee on Transportation, Housing and Urban Development, and Related Agencies (House and Senate)
  - Subcommittee on Labor, Health and Human Services, Education, and Related Agencies (House and Senate)
  - Subcommittee on Military Construction, Veterans Affairs, and Related Agencies (House and Senate)
- Committee on Veterans Affairs (House and Senate)
- Committee on the Judiciary (House and Senate)
- Committee on Banking, Housing, and Urban Affairs (Senate)
- Committee on Financial Services (House)
- Committee on Health, Education, Labor, and Pensions (Senate)
- Committee on Education and the Workforce (House)

Leaders of committees and subcommittees are even more important in crafting legislation because of their influence on the committee's members and the overall agenda of the committee. The committee chair is the highest ranked Member of the majority party who sits on the committee or subcommittee; the ranking member is the highest ranked Member of the minority party on the committee or subcommittee. These individuals have a tremendous amount of influence over legislation in their committee's purview.

> Committee and subcommittee chairs and ranking members make excellent congressional targets to consider when prioritizing your advocacy efforts.

Each committee has its own office and staff members, with a structure similar to a regular congressional office. Committee staff members work closely with Members' personal staff, particularly with the offices of committee chairs and ranking members.

Congressional Office Structure

Like Congress itself, each Member's office is divided up in order to cover as many topics as possible. Senators often have larger offices with many more staff members than representatives because of their larger constituencies.

As you build relationships with your congressional offices, there are a few key staff positions to know and understand:

- Chief of Staff – This individual essentially runs the office and interacts most closely with the Member.
- Legislative Director (LD) – The LD sets the legislative agenda, determines legislative priorities, and manages the legislative assistants.
- Legislative Assistants (or Aides) (LAs) – LAs cover a specific set of issues (such as housing, youth, or veterans) and often take the lead on understanding and making recommendations to the Member about how to vote on specific legislation.
- Scheduler – This individual handles all scheduling requests and closely manages the Member's schedule.

> You most often will deal with the Legislative Assistant (LA) who handles your key issue. This may be the LA for housing/homelessness, veterans, youth, or mental health issues. If you are making a visit to your congressional office or are planning a site visit for your member, you likely also will be interacting with the scheduler.

How a Bill Becomes Federal Policy

There are two main types of legislation (bills) in Congress: appropriations bills and authorizing bills. Appropriations bills fund federal programs for the fiscal year, which begins on October 1. They are concerned only with discretionary funding—funding that Congress has control over and can change from year to year. Authorizing bills are not related to funding but instead create new programs or modify existing ones. In some cases, authorizing bills do allocate nondiscretionary funding for a certain period of time. At the end of the timeframe, the spending has to be either renewed or modified, or the program must be ended.

The following chart shows the step-by-step process that all authorizing bills go through to become federal policy. Because of the complex rules governing this process, there are many exceptions, bypasses, and differences in the passage of each piece of legislation, but this chart provides a general overview.

A bill is introduced by a Member in one chamber where it receives a reference number and is referred to the relevant committee.

The committee and subcommittee hold hearings* (called mark-ups) to debate the bill.

If the bill passes out of committee, it is sent to the floor for debate and a vote by all Members of that chamber.

If the bill passes, it is sent to the other chamber.

In this chamber, the process starts over. The bill receives a reference number specific to that chamber and is referred to a committee and subcommittee.

The committee and subcommittee hold hearings to debate the bill.*

If the bill passes out of committee, it is sent to the floor for debate and a vote by all Members of that chamber.

If the bill passes, versions from both chambers go to a conference committee.* Here, differences in the versions of the bills are reconciled.

This final version goes to both chambers for one last vote.

If the final version of the bill passes both chambers, it is sent to the President, who can either sign it into law or veto it.

The final law goes to the relevant federal department or agency, which develops regulations to fill in the missing details of the policy.

*** = Key Advocacy Opportunity**

TIP Do not wait to reach out to your Members until the last minute. Build a relationship, and your "asks" will have more impact. An "ask" is a request for someone, usually a Member, to take a specific action in order to advance, change, or create a specific piece of legislation. Use the rest of this toolkit to learn strategies to build relationships with your Members.

BEST TIMES TO IMPACT LEGISLATION

As indicated on the chart above, there are certain points in this process during which advocacy will have a greater impact than others. The best time to influence legislation is when it is being considered by the committee. After a bill passes out of committee, it is difficult for advocates and often even Members themselves to change (amend) it. Developing relationships with members of key committees before the bill is introduced allows for more impact in the initial stages of the process.

> An excellent time to make a specific request related to co-sponsoring legislation or voting a certain way is when a bill is still in committee. The time a bill spends in committee is also a great opportunity to influence non-committee Members and to educate them on the impact of the legislation.

TIP In general, it is far easier to provide input on a bill early on in the process than later on, when more details are added and changes become less likely.

If a piece of legislation is held up at any stage of this process, reach out to your elected representatives and urge them to take action. If Members do not identify a specific piece of legislation as a priority, it may not advance, since Congress considers thousands of pieces of legislation each session.

While there is no "bad" time to advocate, it is important to remember that successful advocacy takes time. The most successful advocates have built relationships with their Members and educate them as well as ask them to take specific actions.

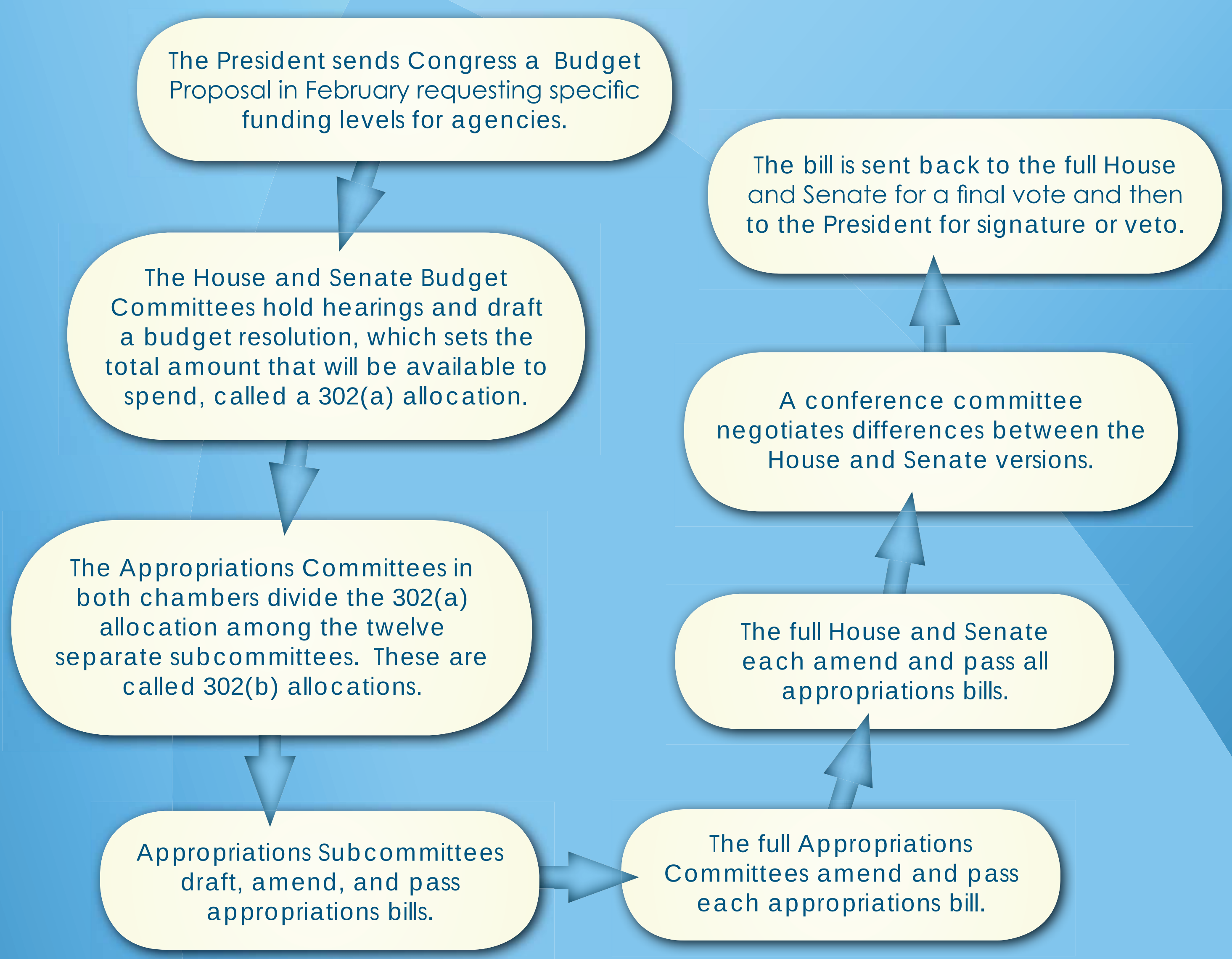
Appropriations Process

The process for funding federal programs each year involves a lot of steps and can seem overwhelming. This section will provide a quick overview of the process, including who is involved and the timing of action by both the President and Congress. **The appropriations process focuses on discretionary spending**. Mandatory (or nondiscretionary) spending, such as the Temporary Assistance for Needy Families (TANF) program, social security, and Medicaid funding, as well as disaster assistance or other emergency appropriations, are handled through separate processes. Funding for these types of programs is included in the initial authorizing bill.

The appropriations process is similar to the process for passing authorization bills, but with some key differences: namely, that **funding *must* be approved each year to run the functions of the government**. Unlike for other pieces of legislation, the President always submits formal recommendations for appropriations. These recommendations are called the **President's Budget Proposal**, which Congress uses as a guide.

The President's Budget Proposal usually is released on the first Monday in February. This marks the start of the federal budget and appropriations process for the upcoming fiscal year. The President's Budget reflects the Administration's funding priorities. It is meant to be a guide to the House and Senate as they make decisions about their budget proposals and funding levels for programs during the appropriations process.

The chart below explains the congressional appropriations process in detail.



TIMING

This entire process is supposed to conclude by the time the fiscal year begins on October 1, but that rarely happens. Congress can pass **continuing resolutions**, which fund the government for a few extra days, weeks, or months until Congress is able to complete action on (or pass) the appropriations bills. Sometimes the appropriations process is not completed until early the following calendar year.

Remember These Five Steps to Success

- Most legislation is created in committees, so committee members, particularly chairs and ranking members, are great advocacy targets.
- Try to concentrate advocacy efforts earlier in the process, rather than later, when possible.
- Build an ongoing relationship with your Member to enhance your chances of impacting legislation.
- Learn which committees your Members sit on and focus on those who sit on key committees.
- Identify key staff members in your congressional offices, including Legislative Assistants who work on relevant issues.

The Policymaking Process: Key Legislative Terms

This glossary will help you to identify and to understand key words and phrases that come up in the legislative and appropriations processes.

Amendment – A change to a bill or document made by adding or omitting portions of the bill.

Appropriations Bill – A bill reported out of the House or Senate Appropriations Committee that assigns government funds to executive branch departments and programs.

Appropriations Committees – These committees decide funding levels for the programs that the federal government funds on an annual basis. There is an Appropriations Committee in both the House and the Senate, and both have a set of subcommittees. Most of the homeless assistance programs and housing programs fall under the House and Senate subcommittees on Transportation, Housing and Urban Development, and Related Agencies (often referred to as T-HUD).

Authorizing Bill – Legislation establishing or modifying a program and setting funding suggestions.

Authorizing Committees – These committees set policy for federal programs. They are responsible for all aspects of federal programs except annual funding.

Bill – A legislative proposal that, if passed by both the House and the Senate and approved by the President, becomes law. Each bill is assigned a bill number. HR denotes bills that originate in the House, and S denotes bills that originate in the Senate.

Budget Authority – The amount of money that Congress gives to departments, such as the Department of Housing and Urban Development (HUD), for their specific programs. In other words, the money allocated to each department for use in running its programs each year.

Budget Resolution – A non-binding resolution that is passed concurrently by both chambers of Congress and lays out the budget plan for the coming fiscal year and some years into the future. Budget resolutions are not law and are not signed by the President.

Chair – The most senior position on a committee or subcommittee. It is always held by a Member of the majority party.

Co-Sponsor – A Member who adds his/her name formally in support of another Member's bill. A co-sponsor is not required, so not every bill has a co-sponsor or co-sponsors. There is no limit on the number of co-sponsors a bill can have.

Committee – A sub-organization within the House or Senate established for the purpose of considering legislation and conducting hearings and investigations on specific issues.

Conference Committee – A temporary, joint committee composed of both House and Senate Members and formed for the purpose of reconciling differences in legislation that has passed both chambers.

The Policymaking Process: Key Legislative Terms - continued

Continuing Resolution – Legislation in the form of a joint resolution enacted by Congress, when the new fiscal year is about to begin or has begun, to provide funds for federal agencies and programs to continue in operation until the regular appropriations bills are enacted.

Discretionary Spending – Spending that is controlled through the annual appropriations process.

Filibuster – An informal term for extended debate or other procedures used to prevent a vote on a bill in the Senate.

Fiscal Year – The federal fiscal year (commonly abbreviated FY) runs from October 1 through September 30 of the following year. This federal fiscal year varies from other fiscal years to allow Congress, which convenes in January, to participate in the budget process.

Mandatory Spending – Mandatory spending is authorized by Congress by setting out eligibility or other criteria that must be followed each year. Examples of mandatory spending include Social Security and Medicaid, which all people who qualify are entitled to receive—no matter how much it costs in a given year. In other words, mandatory spending is not determined by the annual appropriations process.

Mark-Up – A meeting in which congressional committees and subcommittees debate, amend, and rewrite proposed legislation.

Omnibus Bill – A bill that packages together several measures into one combined measure.

Outlays – The money that actually is withdrawn from Congress' budget authority and used for programs. Another way to think of this is the money that a department, such as HUD, withdraws for specific programs, such as tenant-based rental assistance. The process could be described as analogous to smaller amounts withdrawn from a larger checking account.

Ranking Member – The most senior Member of the minority party on a committee.

Sponsor – The original Member who introduces a bill.

Subcommittee – A sub-unit of a committee established for the purpose of dividing the committee's workload. Recommendations of a subcommittee must be approved by the full committee.

Veto – A power that allows the President to refuse approval of a piece of legislation. The President returns a vetoed bill to Congress, generally with a message. Congress can accept the veto or attempt to override the veto by a two-thirds majority of those present and voting in both the House and the Senate.

Developing a Strategic Advocacy Plan

Successful advocacy and lobbying efforts depend upon establishing a strong relationship with your elected officials. When congressional offices trust your organization and know that you are a credible and reliable partner, they will be more likely to respond positively to your advocacy requests.

Developing this kind of relationship takes time. To make the most of that time, you should map out a strategy for your advocacy efforts. This section of the toolkit offers some suggestions for doing so.

Important Strategies for Successful Advocacy

MAKE ADVOCACY A PRIORITY FOR YOUR ORGANIZATION

People working in homelessness assistance are extremely busy, and their jobs often do not explicitly include advocacy. As a result, advocacy efforts on issues related to homelessness may be completed at the last minute when an extremely important and timely issue arises. This kind of "ad hoc advocacy" makes it hard to build strong, long-term relationships with elected officials.

It is critical to **dedicate specific staff time to advocacy and lobbying activities**. It is hard to make advocacy a priority when it is not part of anyone's job description. Setting aside a specific amount of time for advocacy activities and adding those activities to a staff member's work plan and job description increases your organization's dedication to these activities. This approach also will make it easier for your organization to track its time spent on lobbying so that any associated limits are not exceeded.

PRIORITIZE KEY ISSUES AND TARGETS

When developing a strategic advocacy plan, you should prioritize policy issues and congressional targets based on which will best help you achieve your mission.

Organizations that serve people experiencing homelessness must understand a wide array of cross-cutting issues—ranging from housing to reentry and from education to poverty. As a result, it can be easy for organizations to get swept up in the need to work on each and every issue related to homelessness. However, you are more likely to make progress if you spend a lot of time focusing on a few issues of the most importance.

TIP

Involve your board in advocacy. Board members generally are well-respected community leaders interested in the issue of homelessness. In addition, they often represent a cross-section of interests—including business leaders, nonprofit leaders, and other opinion leaders with wide social networks. As a result, they make great advocates.

As you develop your strategic plan, **think about which issues are most important for your organization to prioritize.** Consider which issues and policies most impact your mission and the population you serve, as well as which areas you are likely to be able to impact. The Alliance can help you make these assessments.

TIP

When making these decisions, consider Members' committee assignments, background, and history of support on the issue.

Also, **consider prioritizing congressional targets.** Given that you have limited time and financial resources to devote to advocacy, your organization may choose to focus its energy on a specific Member of Congress (Member). The Alliance can help you determine the best targets on which to focus based on your district and your organization's priorities.

DEVELOP STRATEGIC PARTNERSHIPS

Partnerships should be an integral part of your organization's advocacy plan. Working with partner organizations and coalitions can both reinforce and supplement your own efforts. The more voices that speak up about an issue, the more attention it is likely to receive. **Working with partner organizations can add additional voices on important issues.**

Advocacy campaigns organized among multiple partner agencies can be extremely effective when the effort is well-coordinated and all partners can agree on a common set of goals, objectives, and strategies.

TIP

If you are unsure who might make a good partner locally, refer to state and local partner lists available from the National Low Income Housing Coalition and the National Coalition for the Homeless.

Developing strategic partnerships also allows you to work with others who are focusing on the cross-cutting issues to which you are unable to devote a large amount of time.

CHOOSE AN APPROACH TO YOUR "ASKS"

Advocacy requests can take two main approaches, depending on the audience. In order to build a movement, many organizations explain to the public what they would want Congress to do ideally and eventually, while other organizations make more short-term, pragmatic requests of Congress in order to make concrete advancements.

The benefit to setting an idealistic goal is that it helps to energize advocates and the homelessness assistance field. Explaining the long-term vision for advocacy activities increases individuals' desire to participate in the movement and their understanding of how the actions that they take now can help to shape a long-term change. This kind of approach is helpful in dealing with advocates; it generally has proven to be less effective when working directly with Congress.

Your direct appeals to Members to take action are more likely to be successful if they include only pragmatic requests about what is realistically achievable in the immediate future. This way, congressional offices are more likely to view your organization as a practical, credible partner.

Creating a Year-Long Strategic Advocacy Plan

After you have considered all of the issues raised above, the next step is to put together a long-term plan for your organization's advocacy efforts. Your organization should **identify goals, objectives, and key strategies, and then pair all of these decisions with a timeline**. The section below suggests strategies for creating a strategic advocacy plan. For the purposes of simplicity, this section will refer to a year-long strategic advocacy plan. While this timeframe serves as a guide, your organization should choose the timeline that makes the most sense for you.

SET GOALS AND OBJECTIVES

Any year-long strategic advocacy plan should **include a set of goals and objectives** around which the rest of the plan is based. Assess what your organization's overall aims are for your advocacy efforts.

- A **goal** describes the policy advancement that you ultimately hope to achieve by your advocacy efforts.
- An **objective**, on the other hand, is a concrete action that you would like a Member to take in order to help you reach a goal.

Within each goal, identify the objectives that you hope your Member(s) will achieve. When setting your goals and objectives for the year, consider the issues and targets you decided to prioritize, as well as what issues your partners might cover.

TIP

The most common goals are increasing resources for a specific federal program or passing a specific piece of legislation. Common objectives include getting a Member to write a letter to or personally talk with a certain committee chair or ranking member, introduce legislation, co-sponsor legislation, or vote a certain way on a specific bill.

TIP

Setting a time period for achieving each objective increases the level of accountability and therefore the likelihood of successfully reaching your goals.

Each objective you set should be very clear. It is best to **be as specific as possible**. Vague objectives (i.e., getting a Member to "support" a program) are hard to quantify and are less likely to result in concrete action steps by the Member.

See *Strategic Advocacy Plan Exhibit 1: Example Goals and Objectives Chart* (page 25)

With advocacy efforts, the ultimate goal usually is to increase resources or pass new legislation. Unfortunately, sometimes factors beyond your control (such as the economic or political climate) may make it hard to reach those goals. As a result, it is very important to use additional measures to define success, including objectives for getting your Member to take action or specific outputs for your organization, such as sending a certain number of letters to a Member.

CHOOSE OUTPUTS (STRATEGIES)

After setting goals and identifying targets, begin to consider which actions will best help you to reach your goals and objectives. These actions, sometimes also referred to as "outputs," really describe the specific strategies you plan to undertake to reach your objectives. Key strategies are described in this toolkit and include getting a Member to do a site visit to your program, meeting with a congressional office, sending letters, making phone calls, and working with the media, among others. Some outputs are more time-intensive, while others require less effort but may not be as impactful.

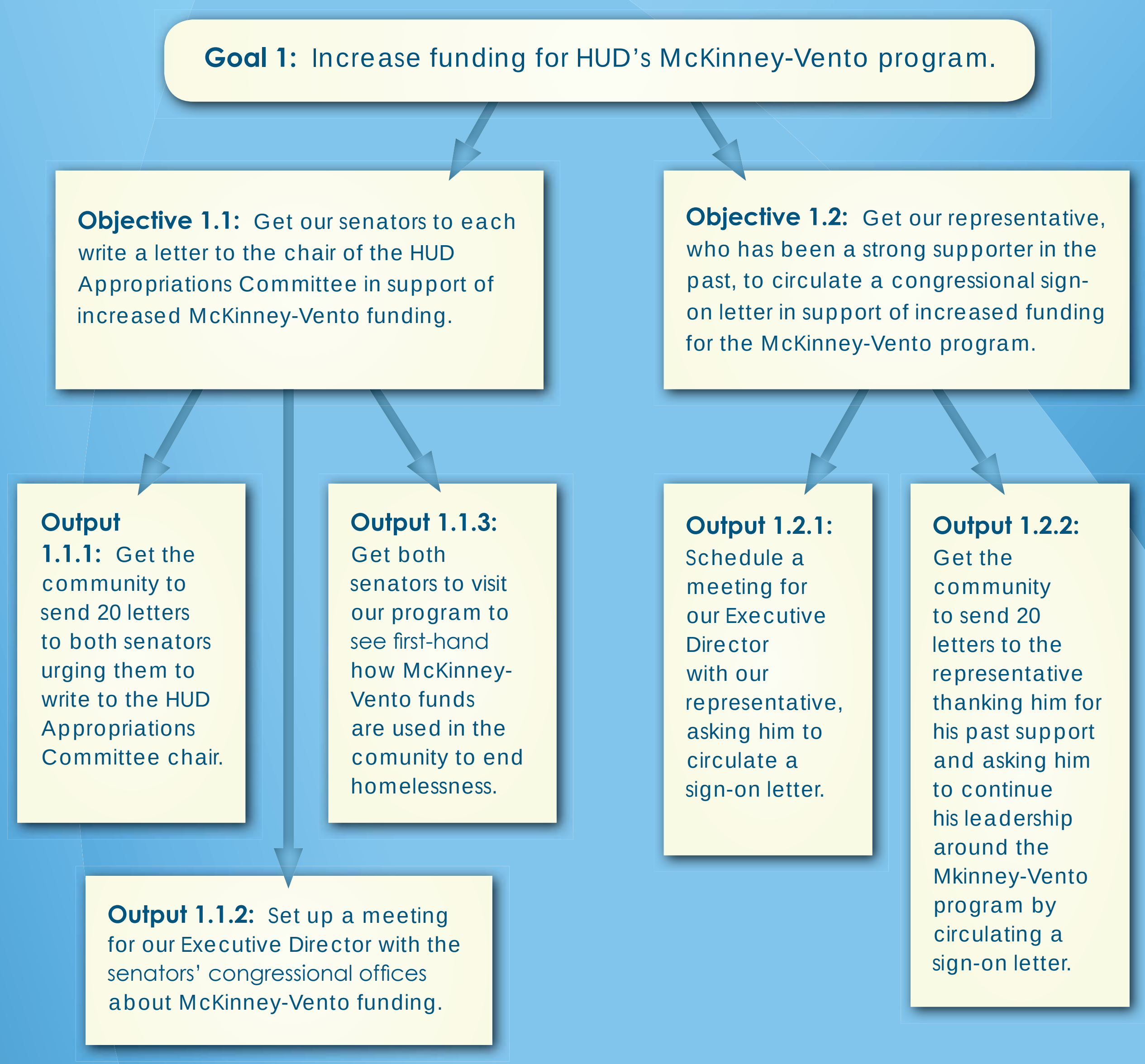
Determine how much work is needed to reach the objectives you set, and then **choose which outputs will be most effective**. You want to be sure to choose the right strategy for successfully achieving your objectives without expending unnecessary resources on the effort. **The more time you put into an advocacy strategy, the more likely you are to be able to affect the outcome positively.**

Be very specific in your strategies. Instead of aiming to "send letters" or "get media attention," aim to "get the community to send 20 letters" to a Member or "place one op-ed and three letters to the editor in the local paper" about a certain piece of legislation.

TIP It also can be helpful to list out the specific activities that you hope will lead to each of these outputs. For example, record that you plan to ask partner agencies at a Continuum of Care meeting to each send a letter to the Member asking him/her to take the hoped-for action.

Numerical and concrete outputs to aim for will help your organization to better structure and evaluate its efforts. Setting specific strategies will help your organization to be more goal-oriented and to focus its efforts on meeting its advocacy objectives and, ultimately, its goals. **Be realistic, but ambitious**. Aim high and push your organization to do its best in its efforts, but do not set yourself up for failure by choosing impossibly high outputs for your efforts.

The figure below provides an example of the relationship among goals, objectives, and outputs.



BUILDING INTERNAL ADVOCACY CAPACITY

Many organizations also like to set goals internally to build their organizational or network capacity to practice advocacy. These kinds of activities also should be included in a strategic advocacy plan.

Just as you would for advocacy goals, you also should **identify specific objectives for each internal capacity goal**. For example, you might plan to conduct a certain number of staff trainings within the next year, to get each staff member to undertake at least one advocacy or lobbying action, or to grow your email network by a certain percentage.

TIP Internal capacity goals might include strengthening staff understanding of the importance of and rules governing advocacy, dedicating additional staff time to advocacy activities, or strengthening the capacity of your organization's email network to conduct advocacy.

See *Strategic Advocacy Plan Exhibit 1: Example Goals and Objectives Chart* (page 25)

Try to identify specific outputs for achieving each objective and the activities that will lead to those outputs. Again, **be as specific as possible in detailing your strategies**. Identify exactly how you plan to get each staff member to take an advocacy action or to grow the size of your email list. The more specific you are, the better equipped your organization will be to put the plan into action.

TIP Add an additional level of detail by laying out each activity associated with all of the strategies you have chosen to undertake. For example, if you have chosen to try to get a Member to do a site visit, include specific activities such as sending the invitation and getting partners to send letters of support.

See *Strategic Advocacy Plan Exhibit 2: Example Timeline* (page 26)

PUT IT ALL TOGETHER

After choosing targets, goals, objectives, and outputs, the next step is to **add a timeline**. As you create your timeline, consider that the appropriations process happens yearly, with most of the activity happening in the spring. The process for creating authorizing bills is usually a longer process with no set timeframe. Try to plot out chronologically when your organization would like to implement each chosen strategy.

Assign a lead to each strategy and task. This will increase internal accountability, thereby improving your chances of successfully completing your strategic advocacy plan.

Once you have put all of this information together into one document, you will have created a strategic advocacy plan that can guide your organization's advocacy activities for the upcoming year. The final result will be an extremely detailed work plan that your organization can follow easily as a checklist of advocacy activities for the year.

Remember These Five Steps for Success

- Dedicate specific staff time to advocacy activities.
- Prioritize policy issues and congressional targets in order to make the most of limited resources.
- Set clear goals and objectives.
- Include a timeline in your plan.
- Be sure to identify lead individuals for each task.

Strategic Advocacy Plan Exhibit 1: Example Goals and Objectives Chart

This is an example of what a Goals and Objectives Chart within a strategic advocacy plan might look like.

GOAL	OBJECTIVES	OUTPUTS/STRATEGIES	ACTIVITIES
1: Increase funding for **McKinney-Vento Homeless Assistance Grants** in the next fiscal year.	1.1: Get **Representative Y** to sign a congressional sign-on letter about McKinney-Vento Funding.	1.1.1: Meet with district and DC staff members who handle housing issues for **Rep. Y**. 1.1.2: Get **Rep. Y** to visit our McKinney-Vento-funded program. 1.1.3: Get our email network to make 20 calls to his office.	1.1.1: • Find out who handles housing issues in each office, and ask for a meeting. 1.1.2: • Invite **Rep. Y** to visit our program, and ask partner agencies and board members to send letters of support urging **Rep. Y** to accept. 1.1.3: • Send 3 action alerts to our email network. • Make personal calls/emails to 10 people with whom we have a strong relationship. Ask them to ask others to make calls, too.
	1.2: Get **Representative Y** to personally talk with the HUD Appropriations Committee Chair about increasing McKinney-Vento funding.	1.2.1: Meet with **Rep. Y** in person to discuss importance of McKinney-Vento funding. 1.2.2: Get community partner agencies to send 20 letters to **Rep. Y's** office asking **Rep. Y** to talk with the HUD Appropriations Committee Chair.	1.2.1: • Work with 2 close partner agencies to set up a joint meeting. All agencies should ask board members to send letters of support. 1.2.2: • Bring sample letters and contact information to a Continuum of Care meeting, and ask everyone to send a letter from their agency. • Send out action alert to our email network.
2: Pass the **Section 8 Voucher Reform Act (SEVRA).**	2.1: Get **Representative Y** to co-sponsor SEVRA.	2.1.1: Talk with **Rep. Y's** housing staff member. Explain the importance of Section 8 in our community and the benefits of SEVRA. 2.1.2: Place a letter to the editor in the local paper that urges **Rep. Y** to co-sponsor SEVRA.	2.1.1: • Prepare talking points and a one-pager to send to the staff member. Call DC housing policy staff member to talk. 2.1.2: • Draft a letter to the editor and ask our board chair to submit it. Follow up with the opinion editor.
3: Build the capacity of our email network to conduct advocacy.	3.1: Grow the size of our email network by 20 percent.	3.1.1: Better advertise how to sign up for our email network. 3.1.2: Add partners to our email list. 3.1.3: Reach out to new community partners with whom we have not worked much in the past.	3.1.1: • Make the sign-up box more prominent on our website's home page. • Include a link to sign up for the newsletter in conference/event brochures, handouts at presentations, and in community meetings. 3.1.2: • Add anyone who attends our conferences/ events to our email network list. • Add key partner contacts - especially those responsible for advocacy or federal grants. 3.1.3: • Reach out to faith - and community-based organizations and other social service agencies that interact with people experiencing or at risk of homelessness.
	3.2: Get our email network to take 30 percent more actions next year than this year.	3.2.1: Personally reach out to 50 percent of the email list, and ask individuals to take a specific action. 3.2.2: Send a survey to our email network to find out what topics are of particular interest to certain individuals. 3.2.3: Identify 5 new "strong" advocates.	3.2.1: • Ask each staff member to make a certain number of phone calls each month. Track responses they get, and gauge interest level. 3.2.2: • Design a survey that asks how interested recipients are in taking action and lists several specific areas where you might ask them to take action. Find out in what areas their interests lie. • Follow up with respondents as appropriate. If someone indicates interest in a specific topic, be sure to personally ask them to take action on that topic at a relevant time. 3.2.3: • Get at least 5 new people to undertake specific advocacy activities multiple times throughout the year.

Strategic Advocacy Plan Exhibit 2: Example Timeline

This is an example of what a timeline of activities within a strategic advocacy plan might look like.

MONTH	ACTIVITY	LEAD
July	• Find out who handles housing issues in **Rep. Y's** local and DC offices, and ask for a meeting to introduce ourselves and discuss the importance of increasing McKinney-Vento funding and passing SEVRA. Invite **Rep. Y** to visit our program during the next congressional recess. • Divide the names on our email list among staff members, giving each of them a handful of people to call each month over the next year to introduce themselves and gauge the level of their interest in advocacy activities.	
August	• Follow up on our invitation for **Rep. Y** to visit our program, and ask our board members and partner agencies to send letters of support for the site visit. • Add key local partners to our email list, focusing on those who are responsible for other organizations' advocacy or federal grant work. • Connect with nontraditional partners, including faith- and community-based organizations with whom we do not work regularly but who interact with people experiencing homelessness. Gauge their interest in joining our email list or partnering on advocacy efforts with us. • Host site visit to our McKinney-Vento-funded program for **Rep. Y**, explaining the importance of these funds and asking **Rep. Y** to support increased funding for the program this year.	
September	• Send out action alert about McKinney-Vento funding for this federal fiscal year, which begins October 1. • Follow up on action alert with about 10 people with whom we have a strong relationship. Ask them to ask others to make calls, too.	
October	• Make the sign-up box on our website for joining our email list more prominent on the homepage. • Design a survey that asks email list members how interested they are in taking action and identifies several key areas in which they might be most interested.	
November	• Include a link to sign up for our email list in brochures announcing our upcoming conference. • Distribute the survey to our email list. Send out a reminder a few days before the survey deadline, asking people who have not yet filled it out to complete the survey.	
December	• Analyze the survey results, and follow up individually with respondents as appropriate.	
January	• Add anyone who registers for our conference to our email list. • Send out action alert about McKinney-Vento funding to our email list. Ask recipients to call **Rep. Y's** DC office and ask that **Rep. Y** sign a congressional sign-on letter in support of increased funding for the McKinney-Vento program. • Follow up on action alert with about 10 people with whom we have a strong relationship. Ask them to ask others to make calls, too.	
February	• Send out a reminder action alert, asking recipients to continue asking **Rep. Y** to sign onto the McKinney-Vento congressional sign-on letter, if **Rep. Y** has not already done so.	
March	• Work with 1-2 close partner agencies to set up a joint meeting with **Rep. Y**. Each agency's board members should send letters of support for the meeting.	
April	• Hold joint meeting with **Rep. Y**, and share information about the importance of SEVRA and Section 8 to our community, along with the importance of McKinney-Vento funding. • Follow up on the meeting with **Rep. Y** by sending a one-pager on SEVRA funding to the appropriate staff member. A few days later, follow up with a phone call to confirm receipt and ask if the staff member has any outstanding questions.	
May	• Send action alert to email network asking recipients to write a letter thanking **Rep. Y** for signing the McKinney-Vento congressional sign-on letter and asking **Rep. Y** to further demonstrate a commitment by personally asking the HUD Appropriations Committee Chair to provide increased funding for McKinney-Vento programs in the fiscal year starting on October 1. • Draft a letter to the editor about the importance of SEVRA urging **Rep. Y** to co-sponsor the legislation. Ask a board member if the letter can come from him/her.	
June	• Bring sample letters to the Continuum of Care meeting, and ask partner agencies to send letters asking **Rep. Y** to personally talk with the HUD Appropriations Committee Chair about increasing McKinney-Vento funding. • Submit the letter to the editor about SEVRA to the local paper, and then follow up with the opinion editor. • Begin drafting next year's strategic advocacy plan.	

Using Everyday Communications to Build Congressional Relationships

A strong relationship with your Member of Congress (Member) requires regular communication throughout the year. Your primary method of interacting with your congressional office likely will be calling and writing. Site visits and meetings are extremely effective strategies, but the difficulties and logistics involved with scheduling them necessitate that they be implemented less frequently than strategies such as making a phone call or sending a quick email to a congressional office.

In all communications with your congressional office, you want to present your organization and your case in the most positive and compelling way possible. This section of the toolkit is designed to help you make the most of the many quick calls, letters, emails, and faxes you might send to your congressional office each year.

Types of Communication

Phone calls, emails, and letters all can be extremely effective at sharing your point of view or updating a congressional office. These likely will be your primary ways of interacting with your senators and representatives. For letters, using email or fax is a very effective way to transmit the letter.

TIP If you want to write a letter to a Member, write it as you normally would, and then fax it in or attach it to an email, instead of sending it via regular mail.

Congressional offices strongly prefer to receive letters via email or fax instead of through regular mail. This is particularly true of Washington, DC offices. Since the anthrax scare in the early 2000s, all regular mail is heavily screened and generally extremely delayed before it arrives at a congressional office in Washington, DC. Always use fax or email if possible to ensure timely receipt.

TIP In many cases, your key point of contact will be the person who handles housing and homelessness issues, though you might want to speak with someone who works on veterans' issues, family/children's issues, welfare issues, or other issues.

TIP To find contact information for staff members, you can call the **congressional switchboard** at 202-224-3121. Ask to be connected with the relevant congressional office, and then ask the front desk who handles the specific policy issue in which you are interested for the senator/representative.

Who to Contact

In any advocacy activities, you should deal primarily with the senators and/or representatives who directly represent the area(s) your program serves. To find out who represents your district(s), visit either www.house.gov or www.senate.gov.

When communicating in any format with a congressional office, try to speak with the staff person who handles the relevant policy issue on behalf of the Member. This individual deals with the issue on a daily basis and makes recommendations to his/her boss about how to vote on specific pieces of legislation.

It is easy to find out who handles a specific issue for a congressional office. Simply call the office and ask who handles that issue.

Staff turnover is high in Members' Washington, DC offices. As a result, staff members sometimes must exchange areas of responsibility with their colleagues. Do not worry if the person with whom you have been working suddenly tells you that he/she no longer is handling the issue; simply reach out to the new individual, and begin to get to know that person as you continue to keep in touch with the old person in their new position.

See *Communication Exhibit 1: Example Faxed Thank You Letter* (page 31)

Developing an Ongoing Relationship through Communication

While you can and should feel free to do advocacy or lobbying via calls or emails with congressional offices, it is also important to develop a strong relationship with the congressional office wherein you are not always asking for something. Educational communication, which constitutes general advocacy as opposed to lobbying communication, also will be an important part of your relationship. For more information on the difference between advocacy and lobbying, see "Knowing the Rules for Nonprofit Lobbying" in this toolkit. This general communication might include local updates or thank you notes for something the Member has done.

Get to know the staff members who work on your issue. Occasionally send those individuals short emails with quick updates. Send them press clippings, reports, alerts about events, and other small pieces of information related to homelessness and your organization from time to time. While you should not inundate the staff members with daily email updates, it is okay to pass along an update every few weeks.

You can even ask if the staff member would like to be added to your organization's email newsletter or attend an upcoming local coalition or Continuum of Care meeting.

These kinds of periodic updates that come without a request for action will help the staff member and the congressional office get to know you and your organization. They may even **begin to ask *you* questions** about homelessness, such as how they should vote on a certain bill or what is happening locally with a specific program.

Quick informational phone calls or emails can go a long way toward cementing a relationship with a congressional office, as they demonstrate that you are looking to form a long-term, give-and-take relationship.

Key Strategies for Advocacy Communication

While educational and informational communication is critical to building a relationship with your Members, from time to time you may also wish to urge them to take a specific action.

When calling or writing to congressional offices, **be clear about your purpose for contacting them.** State the reason for your contact clearly and concisely. Frame each point that you make in your call or letter around that one issue. Make only points relating directly to your main point. This will ensure that staff members understand exactly why you are contacting them and will increase the likelihood that they will remember what you want their boss to do and understand why.

TIP If your local paper runs a story on homelessness or profiling your organization, forward a copy to the staff member with a note saying you just wanted to make sure he/she saw it. If your organization releases a new study or has new outcomes data, pass that information along, too.

TIP If a staff member takes the initiative to email you with questions, make sure you respond promptly and thoroughly. Being a staff member's "go-to" person is a sign of a strong relationship and puts you in one of the best positions you can have as a constituent.

TIP If you are speaking with a congressional office via phone, take a few minutes before you call to plan out exactly what you want to say. This will help you to be more concise and to better structure your remarks.

TIP If you provide a concrete action step for a congressional office to take, such as sending a letter or voting for a specific bill, the Member will have a clear understanding of what you want him/her to do. Asking Members for something vague, such as to "express their support on the issue of homelessness," does not always leave them with a clear sense of what you want them to do and is therefore less likely to result in any action at all.

See *Communication Exhibit 2: Example Emailed Advocacy Letter* (page 32)

When possible, **try to use both data and personal stories** (anecdotes) to back up your main point. Some Members are more likely to take action based on data and evidence-based outcomes, while others may be more likely to act after hearing the story of someone whose homelessness was prevented or ended.

When you want the Member to do something, always state *exactly* what action you want him/her to take. Be as clear and precise as possible in your request, and be sure to fully explain why that action is so important to your community.

Ask when you can follow up on your request. In most cases, staff members will not be able to agree right away that their boss will take action; they will have to check with their boss first. Ask the staff members when you can follow up to see if they have had a chance to talk with the Member about your request.

If you are asking for additional resources for an existing federal program, it is generally helpful to try to express a positive attitude about the program. It is okay to point out specific challenges you face that might be correctable, but Congress generally does not want to continue to fund—let alone provide increased resources for—programs that are not working well.

Remember These Five Steps for Success

- Avoid sending letters through regular mail to Washington, DC congressional offices.
- Contact the staff person who works on the specific issue of importance to you.
- Send quick, informational emails and updates to the staff person who handles the issue you care about.
- Clearly and concisely state your purpose for contacting a congressional office.
- If you have urged a Member to take action, ask when you can follow up on your request.

Communication Exhibit 1: Example Faxed Thank You Letter

This is an example of a thank you letter to a Member of Congress.

The Honorable Richard Durbin
309 Hart Senate Building
Washington, DC 20510
Attn: Candice Cho

Dear Senator Durbin,

I am writing to commend you on the passage of the Homeless Emergency Assistance and Rapid Transition to Housing (HEARTH) Act. The bill, which was included as part of the Helping Families Save Their Homes Act, reauthorizes the Department of Housing and Urban Development's McKinney-Vento Homeless Assistance programs, which represent the largest federal investment in preventing and ending homelessness.

The HEARTH Act is the first significant reauthorization of McKinney-Vento in nearly 20 years and allocates millions more to homelessness prevention, rapidly re-housing homeless families, and providing permanent supportive housing for homeless people with disabilities.

Your leadership on this important issue over the past few years, including co-sponsorship of S. 896, is greatly appreciated. All of us working to end homelessness on the ground are thankful to have a champion like you representing us in the U.S. Senate. Reauthorization of McKinney-Vento will bring much-needed energy and resources to our local efforts, including:

- Nearly $4 million annually to prevent individuals and families from falling into the tragedy of homelessness in the first place (a four-fold increase);
- Expanding the definition of homelessness to increase opportunities to serve homeless families with children, a population growing in number and need;
- Streamlining the application process and grantee requirements, so providers can spend more time serving the most vulnerable among us; and
- Codifying the local Continuum of Care process which prioritizes local, collaborative, and comprehensive decision-making.

On behalf of the thousands of Chicagoans who rely on these housing programs and supportive services and the dozens of homeless agencies that provide them, thank you again for your tremendous support of the HEARTH Act. We could not have done it without you.

Sincerely,

Nicole Sauler

Nicole Sauler
Director of Public Policy

Communication Exhibit 2: Example Emailed Advocacy Letter

This is an example of an advocacy email or fax you could send to a Member of Congress.

Dear Ms. Reinstein,

I am writing to urge Representative Hastings to sign onto a "Dear Colleague" letter being circulated by Representatives Gwen Moore (D-WI) and Geoff Davis (R-KY) in support of funding HUD's McKinney-Vento Homeless Assistance Grants at $2.4 billion. A copy of the letter is attached.

We greatly appreciate your commitment to ending homelessness and thank you for helping enact the HEARTH Act last year, which reauthorizes the McKinney program. The HEARTH Act changes the way that funds are proportioned and increases funding for activities, particularly homelessness prevention and assistance to families and rural areas. However, to fully implement these changes, we need $2.4 billion for McKinney programs in FY 2011. Without this level of funding, our community may receive little to no funding for new projects in FY 2011.

I would also like to invite the congressman to visit a local homelessness assistance program, when he is back in the District for the spring recess to witness first-hand how McKinney funds are used in your District to help end homelessness.

Please let me know when would be a good time to follow up with you. I look forward to Representative Hastings' support on this critical issue.

Sincerely,

Achieving Effective Site Visits

Site visits, or tours of local programs, are one of the single most impactful strategies for persuading your elected officials to strengthen government's response to homelessness. They provide an opportunity for your Members of Congress (Members) to see first-hand how a program works, the impact it has on the lives of people in their district and community, and the ways in which the program prevents and ends homelessness.

Site visits help policymakers to connect the dots between the policy issues with which they deal every day and the ways in which programs implement solutions-focused interventions. As a result, they are more likely to support new and increased resources for preventing and ending homelessness.

The key to a successful site visit is ample preparation and planning. This section of the toolkit will provide you with all of the strategies and tools you need to plan and host an effective site visit for your elected official.

Setting Goals and a Plan

Decide which Member you want to invite, and when you want that elected official to visit your program. Consider your Members' committee assignments, bills they have authored or co-sponsored, and their past support for related issues. Associating your site visit with Members' own initiatives or committee assignments can increase their interest in the site visit.

Decide early on which policy issue you hope to advance (i.e., increased funding for McKinney-Vento Homeless Assistance Grants, Runaway and Homeless Youth Act, or services in supportive housing programs, or passage of the Services for Ending Long-Term Homelessness Act). Focus on a federal policy issue—which is something the Member can work to address—rather than a local policy issue over which he/she has little control.

TIP **Create a work plan and timeline,** and identify who is responsible for each task. Make sure each person is committed to completing his/her task. This step is particularly important if you are coordinating with a large group of people, such as a coalition. You want to be clear from the beginning about what each person has committed to doing.

See Site *Visit Exhibit 1: Sample Work Plan* (page 38)

It is important to **pick just one or two policy issues** on which to focus. If you discuss too many issues, the Member will have trouble remembering any of them. If you focus on just one issue, the message is more likely to "stick."

TIP Ask colleagues and board members to think about who they know and might want to invite. "Grasstops" leaders in the community are great people to consider. These are individuals who are able to mobilize supporters in their community; elected officials, religious and business leaders, and other opinionmakers all could be grasstops leaders.

Deciding Who Else to Invite

Think about which local opinion leaders you might want to invite to attend the site visit along with the Member, such as local elected officials, board members, or other community leaders. The more community leaders who plan to attend, the more likely the Member is to accept your invitation.

Consider inviting local media to give your organization and the Member some positive press attention.

A Member often is more likely to come if he/she knows that there will be a photo opportunity with the press there. This is also a great way for your organization to receive positive press attention.

TIP You can find the House and Senate annual legislative schedules at www.house.gov and www.senate.gov. Generally, Members are in their districts for one week over major federal holidays (including President's Day, Memorial Day, July Fourth, and Thanksgiving), with longer recesses occurring around Easter, in August, and near the winter holidays. These are all great times to invite Members to tour a program.

See *Site Visit Exhibit 2: Sample Invitation (page 40)* and *Site Visit Exhibit 3: Example Invitation* (page 41)

Scheduling Your Site Visit

When choosing a time period to invite your Member to do a site visit, consider when Congress will be in recess and the senator/representative is likely to be in the district.

Be as flexible as possible on the exact date and time of the site visit. The easier you make it for congressional offices to schedule a site visit, the more likely it is that they will be able to make it happen. Try to avoid setting a specific date and time in advance of checking with the Member's scheduler, if at all possible.

Send a formal letter inviting the Member to visit your program site. The letter should explain which policy issue you plan to discuss.

Make sure to **fax AND email** your invitation to both the **Washington, DC and district offices**. You should copy the staff person who works on the policy issue that you are promoting (this is often the housing staff person), as well as the scheduler.

Follow up on your fax and email with a phone call a few days later to ensure receipt, and ask who the point of contact for the visit should be (this is usually the district scheduler). A week or two later, follow up with that individual to confirm your meeting. Do not worry if it takes a while to schedule the site visit. Be patient, but continue to follow up.

Do not forget to confirm **how long** the site visit will last. Members' schedules often are subject to last-minute changes, so **confirm your visit again** close to the date.

Because of their busy schedules, it can take a lot of advocacy to get Members to attend a tour in person. To increase your chances, ask important board members, key stakeholders, and community members to **write letters of support** for your invitation.

If you already have a relationship with a staff person in the congressional office, make sure that individual is aware that his/her boss is visiting your program.

See *Site Visit Exhibit 4: Sample Letter of Support* (page 42)

Congressional offices may want to send a staff person in place of your elected official, but remember that the point of the site visit is for the *policymaker* to witness the program's success first-hand. Therefore, it is usually worth the extra effort to try to get the Member himself/herself to attend. However, site visits still can be very productive with staff members.

Preparing for Your Site Visit

Set an agenda for your site visit with planned stops in different parts of your facility or with particular clients and staff. Decide which clients, staff, or other local leaders and notables should speak during the event.

TIP

You may want to **invite the Member to speak**. If so, prepare some suggested talking points, and send these to your point of contact in the congressional office.

See *Site Visit Exhibit 5: Sample Agenda* (page 43), *Site Visit Exhibit 6: Example Agenda* (page 43), and *Site Visit Exhibit 7: Example Agenda* (page 44)

Prepare someone to **tell a personal story**. The individual should share his/her experience of having an episode of homelessness ended or prevented through the program. This is one of the best ways to demonstrate to the Member the impact of a federal policy on a real person through a real program.

Practice. Make sure speakers know what they should discuss and for how long they should speak. This will ensure that everyone is on the same page and that the site visit will run more smoothly.

TIP

A great way to make the connection between a program tour and the policy issue is to explain which federal funds you use to run your program. You should also emphasize how much more your program could do than it is already doing if it were to receive additional resources.

Make sure your speakers are "on message" and know that they should **continually make the connection between what the Member and congressional staff are seeing and the policy issue** for which you are advocating.

Prepare handouts about your program and about your policy request. Handouts about your program should provide an overview of the program and the people that it serves. Highlight existing outcomes or cost-savings data.

TIP

The Alliance can help you create policy handouts on your policy issue, which should include a brief overview of the federal policy, what you want the Member to do, and why that action is so important. Many policy handouts are already available at www.endhomelessness.org.

Send a briefing memo to the congressional office. Copy the person who handles your policy issue, along with the staff member who will be accompanying the Member on the tour (if different). Detail the purpose, draft agenda, and other invitees. Explain which policy issue you plan to discuss, and urge the Member to consider using this event to announce a commitment to undertaking a specific task to express his/her support for that issue. If a representative of the media has committed to attending the site visit, mention this in the memo.

See *Site Visit Exhibit 8: Sample Briefing Memo* (page 45)

If you have decided to **invite members of the media**, make sure to compile a list of key members of the local media, and then send them a press release or media advisory. For more information on working with the media, see the section in this toolkit entitled "Engaging the Media."

Any **media efforts should be coordinated with the communications staff person in the congressional office**, as that individual may already be contacting the media.

See *Site Visit Exhibit 9: Sample Media Advisory* (page 46) and *Site Visit Exhibit 10: Example Media Advisory* (page 47)

During the Meeting

Begin by explaining how your program works, whom it serves, and what your outcomes are. Remember to use this time to discuss your critical policy issue and **what specifically you want the Member to do** in support of the issue (i.e., co-sponsor legislation or send a letter). Make sure the elected official and his/her staff understand the connection between what they are seeing and the federal policies for which you are advocating.

TIP

Take pictures with the Member and attendees. These are great to share with the media, put on your website, or send out in your newsletter. They also can be shared with the congressional office for use in its newsletter and website.

Let the Member and his/her staff know that you will be following up with him/her on this issue, and **ask when and with whom** you should follow up.

Following Up from the Meeting

Send a thank you note summarizing the policy issue and any action the Member agreed to take in support of your issue. Provide the staff members who attended the site visit and who normally handle your policy issue (if different) with any additional information requested during the visit or responses to unanswered questions.

At the time suggested, call the staff person with whom you were told to follow up. Urge that person to make sure that the Member takes the action you requested.

See *Site Visit Exhibit 11: Sample Thank You Letter* (page 48) and *Site Visit Exhibit 12: Example Thank You Letter* (page 49)

Continue to **follow up on your policy request and build your relationship** with the congressional office through letters, phone calls, meetings, and media outreach. The Alliance can work with you to build upon your relationship after a successful site visit.

Remember These Five Steps for Success

- Pick one to two policy issues on which to focus.
- Get key stakeholders to send letters of support to urge the Member to come.
- Tie what the elected official is seeing and hearing to the policy issue.
- Find out when and with whom you can follow up.
- Send a thank you note and follow up on commitments made during the site visit.

Site Visit Exhibit 1: Sample Work Plan

To help plan your site visit, consider making a work plan like the one below.
You can even print this work plan out and use it to guide your planning and implementation process.

Policy Issue:
(I.E., INCREASED FUNDING FOR MCKINNEY-VENTO HOMELESS ASSISTANCE GRANTS, RUNAWAY AND HOMELESS YOUTH ACT, OR SERVICES IN SUPPORTIVE HOUSING PROGRAMS)

Specific Task for Member to Take:
(I.E., CO-SPONSOR OR INTRODUCE A SPECIFIC PIECE OF LEGISLATION, WRITE A LETTER TO THE CHAIRMAN OF A KEY COMMITTEE, ETC.)

Goals:

- Strengthen existing relationship (OR BUILD NEW RELATIONSHIP) with (SENATOR/ REPRESENTATIVE X).
- Link (FEDERAL POLICY) to the real people and programs in our community it impacts.
- Share how our program has been successful in using existing resources, and explain what we could do if we had more.
- Bring media attention to the success of our facility and to the urgent need for additional federal funding.

Site Visit Exhibit 1: Sample Work Plan *- continued*

Timeline/Tasks

DEADLINE	TASKS	PERSON RESPONSIBLE
6-8 Weeks Prior to Ideal Date for Site Visit	▪ Identify which Member we want to invite to visit our program, when we want him/her to come, and what policy issue we want to highlight. ▪ Create work plan and timeline. ▪ Identify other key stakeholders we want to invite, and ask them if they would attend.	
4-5 Weeks Prior to Site Visit	▪ Fax AND email to both the district and DC office a formal letter inviting the Member to do a site visit of our program (see sample invitation). Copy the staff person who works on the policy issue that we are highlighting. ▪ A few days later, follow up on our invitation with a phone call to ensure receipt, and ask whom the point of contact should be moving forward.	
3-4 Weeks Prior to Site Visit	▪ Ask colleagues, board members, key stakeholders, and other community members to write letters of support for our invitation (see sample letter of support). ▪ Continue to follow up with our point of contact in the congressional office until date/time is confirmed. ▪ Identify speakers (including a consumer).	
2-3 Weeks Prior to Site Visit	▪ Set an agenda (see sample agenda). ▪ Prepare a briefing memo, and send it to the congressional office (see sample briefing memo). ▪ Compile a list of key members of the local media.	
1-2 Weeks Prior to Site Visit	▪ Prepare handouts on our program and the policy request. ▪ Work with speakers to finalize their remarks and make sure they relate the policy issue to what the Member is seeing. Ask them to arrive early on the day of the site visit. ▪ Practice the agenda with all of the speakers.	
1 Week Prior to Site Visit	▪ Re-confirm date and time with congressional office. ▪ If Member is speaking, send suggested talking points to congressional office. ▪ Finalize attendee list. ▪ Contact key local media to let them know the site visit is occurring and to ask if they would be interested in attending. ▪ Send out media advisory to local media, inviting them to attend (see sample media advisory).	
1-2 Days Prior to Site Visit	▪ Confirm all logistics for the site visit.	
Day of Site Visit	▪ Send out press release to local media.	
During the Site Visit	▪ Make sure speakers arrive early. ▪ Take pictures. ▪ Remember to tie what the Member is seeing into our policy issue. ▪ Explain what specific action we want the Member to take. ▪ Ask when and with whom we can follow up.	
Within One Week after the Site Visit	▪ Send a thank you letter to the Member (see sample thank you letter). ▪ Follow up at the appropriate time with the relevant staff member on the policy issue. ▪ Answer any remaining questions. ▪ Put pictures from the site visit in our newsletter.	

Site Visit Exhibit 2: Sample Invitation

To invite your Member of Congress to do a site visit, send a formal invitation. You can use the sample invitation below as a template.

PUT ON ORGANIZATIONAL LETTERHEAD

The Honorable (FIRST AND LAST NAME OF MEMBER)
U.S. House of Representatives (OR) U.S. Senate
Washington, DC (HOUSE ZIP CODE = 20515; SENATE ZIP CODE = 20510)
Attn: (DC SCHEDULER AND DISTRICT SCHEDULER)
CC: (DC STAFF MEMBER(S) WHO WORK ON YOUR POLICY ISSUE)
Fax: (FAX NUMBER)

Dear (SENATOR/REPRESENTATIVE X),

On behalf of (ORGANIZATION), I would like to invite you to join us and several of your constituents on a tour of (PROGRAM NAME). We would like to take this opportunity to thank you for your support of our work to end homelessness, to demonstrate the success of local homelessness assistance programs, and to discuss how we can continue to work together to advance solutions to homelessness in (COMMUNITY) and across the state.

Using a solutions-focused intervention, (PROGRAM NAME) has ended homelessness for numerous (VETERANS, YOUTH, FAMILIES WITH CHILDREN, INDIVIDUALS, AND/OR PEOPLE WITH DISABILITIES) in our community. (INCLUDE INFORMATION ABOUT THE PROGRAM AND ITS SUCCESS AND PROGRAM-SPECIFIC OR NATIONAL COST-SAVINGS/OUTCOMES DATA.)

(TRY TO INCLUDE LOCAL INFORMATION ABOUT YOUR COMMUNITY'S PROGRESS IN ENDING HOMELESSNESS. FOR EXAMPLE, INFORMATION ABOUT:

- YOUR COMMUNITY'S TEN YEAR PLAN TO END HOMELESSNESS;
- DATA SHOWING REDUCTIONS IN HOMELESSNESS;
- HOW YOU ARE COMBATING THE IMPACT OF THE RECESSION;
- SUCCESS IN ENDING HOMELESSNESS AMONG VETERANS, FAMILIES, OR YOUTH; AND/OR
- INTERESTING PARTNERSHIPS.)

We have invited nonprofit providers, key stakeholders, and program participants to join you. These individuals can provide insight into the incredible progress being made to advance programmatic solutions to homelessness in (COMMUNITY) and the importance of (POLICY ISSUE) to our community. Invitees include (LIST KEY PEOPLE WITH WHOM THE MEMBER OF CONGRESS HAS A RELATIONSHIP).

I understand that you are likely to be at home over the next congressional recess and hope that you will be able to attend a tour during that time. I will follow up with your scheduler to identify the best date and time and to provide further details regarding the agenda.

Sincerely,

Site Visit Exhibit 3: Example Invitation

Below is a real-life example of an invitation for a Member of Congress to participate in a site visit.

Dear Congressman Simmons:

We'd like to invite you to join us and several people from around your district for a visit to the Hooker Hotel and Brick Row Apartments in Willimantic. We are concerned about the need for more supportive housing in eastern Connecticut and would like your help.

Once a grand hotel, the Hooker Hotel is now a dilapidated apartment building infamous for its drug activity. It drains the potential of downtown Willimantic. But Common Ground Community, an internationally recognized developer of supportive housing, has plans to acquire and renovate the Hooker. In many neighborhoods struggling with crime and poverty, in Connecticut and elsewhere, conversion of problem properties into supportive housing has led to phenomenal neighborhood transformations.

A success story is Brick Row Apartments, also in Willimantic. This development houses tenants who were formerly homeless or at-risk of homelessness, due to mental illness, chemical dependency or chronic health challenges. It combines affordable apartments with on-site access to support services. Supportive housing of this sort is a proven, cost-effective means of re-integrating families and individuals into the community. It is a less expensive and more effective alternative to institutional settings.

We hope you'll join us to visit the Hooker Hotel, to see how supportive housing could contribute to downtown revitalization, and to visit Brick Row, to see a successful supportive housing development that is a valuable asset to the community. In addition, we're assembling a variety of people with important perspectives on supportive housing. These people have expressed interest in meeting with you:

- Michael Skrebutenas – Common Ground Community
- Michael Paulhus – Windham First Selectman
- Rheo Brouillard – President, Savings Institute
- From Windham Regional Community Council:
- Jeff Beadle, Executive Director
- Jane Metzler-Potz, Associate Director
- Cathy Cementina, Director of Project Home
- Bill Woodbury, Veterans Administration
- Bev Goulet – Director of Social Services, City of Norwich
- Charlotte Schroeder – Assistant Development Director for the City of New London, and Chair of the Southeastern CT Partnership on Housing and Homelessness.
- Tom Hyland – Thames River Family Program in Norwich
- Mike Rosenkrantz – Alliance for Living in New London
- Karen Cummings – Southeastern CT Mental Health Authority
- Betsy Crum – Corporation for Supportive Housing
- Shelby Mertes – Partnership for Strong Communities

We would like to talk with you about the Ending Long-Term Homelessness Services Initiative (ELHSI). ELHSI would add an additional $30 million to the Health and Human Services budget, to fund services in supportive housing. Building on the President's Samaritan Initiative, these additional funds would be an important down payment toward producing and sustaining 150,000 units of permanent supportive housing. Funding for services will be a critical component of Connecticut's efforts to end long-term homelessness through the creation of supportive housing.

We expect this visit would take about three hours. We understand you will be in Connecticut until the end of August, and hope you're able to find time to visit with us before returning to Washington.
If you have questions or thoughts on this, please feel free to call us at (860) 247-4322.

Sincerely,

Diane Randall	Shelby Mertes
Director	Outreach Director

Site Visit Exhibit 4: Sample Letter of Support

You can use this sample letter of support as a template to provide to other organizations and individuals in your community to send letters in support of your site visit request.

(PLEASE PERSONALIZE THIS LETTER AS MUCH AS POSSIBLE AND PLACE ON YOUR ORGANIZATION'S LETTERHEAD)

The Honorable (FIRST AND LAST NAME OF MEMBER)
U.S. House of Representatives (OR) U.S. Senate
Washington, DC (HOUSE ZIP CODE = 20515; SENATE ZIP CODE = 20510)
Attn: (DC SCHEDULER AND DISTRICT SCHEDULER)
CC: (DC STAFF MEMBER(S) WHO WORK ON YOUR POLICY ISSUE)
Fax: (FAX NUMBER)

Dear (SENATOR/REPRESENTATIVE X),

I am writing to thank you for your commitment to ending homelessness and to encourage you to accept a recent invitation to attend a tour of (PROGRAM NAME) with several people from your district. (PROGRAM NAME) is a great illustration of the incredible progress (CITY) is making to implement cost-efficient interventions to keep (VETERANS, YOUTH, FAMILIES WITH CHILDREN, INDIVIDUALS, AND/OR PEOPLE WITH DISABILITIES) safely housed.

We appreciate your recent efforts to expand federal resources for preventing and ending homelessness. We are anxious for this opportunity to show you first-hand the success of (SUPPORTIVE HOUSING/RAPID RE-HOUSING/OTHER ACTIVITY) in your district (OR THANK MEMBER FOR SOMETHING HE/SHE HAS DONE FOR YOU, YOUR PROGRAM, OR THE COMMUNITY RECENTLY).

(INCLUDE LOCAL INFORMATION ABOUT THE PROGRAM OR THE COMMUNITY'S PROGRESS IN REDUCING HOMELESSNESS. EXAMPLES INCLUDE INFORMATION ABOUT:

- YOUR COMMUNITY'S TEN YEAR PLAN TO END HOMELESSNESS;
- DATA ON REDUCTIONS IN HOMELESSNESS;
- HOW YOU ARE COMBATING THE IMPACT OF THE RECESSION;
- SUCCESS IN ENDING HOMELESSNESS AMONG VETERANS, FAMILIES, OR YOUTH; AND/OR
- INTERESTING PARTNERSHIPS.)

(INCLUDE A PERSONAL CLOSING, OR SAY SOMETHING LIKE...)
Thank you in advance for your consideration of this request. I look forward to continuing to work with you on this critical issue.

Sincerely,

Site Visit Exhibit 5: Sample Agenda

You can work the agenda items into the conversation as the senator/representative tours a program facility, OR you can do a separate presentation before or after the tour is completed.

Welcome and Introductions

The Problem

How does homelessness affect your local community?
What obstacles to ending homelessness is the community facing?

The Solution

How has the community come together to tackle the problem of homelessness?
What innovative programs or partnerships do you have?
What outcomes do you have?
Provide a perspective from a client/consumer/tenant.

Specific Policy Request and Role of the Federal Government

Ask for something specific here. The point is to give the policy request a human face by showing the programs and people that these policies affect.

Response from the Member

You should make sure that the staff has prepared the Member with what to say. You can suggest what you would like the Member to say.

Closing and Summary

Site Visit Exhibit 6: Example Agenda

This is a real-life example of an agenda from a site visit for a Member of Congress.

Meeting with Congressman Rob Simmons
To Discuss the Ending Long-Term Homelessness Services Initiative (ELHSI)

August 21
Brick Row Apartments
Willimantic, CT

- Welcome
- Introduction to the Ending Long-Term Homelessness Services Initiative (ELHSI) – Shelby Mertes, Partnership for Strong Communities (5 minutes)
- A tenant's experience with supportive housing (5 minutes)
- Homelessness in the 2nd Congressional District 10 minutes)
- Why we need more supportive housing – Janice Elliott, Corporation for Supportive Housing (10 minutes)
- Questions and discussion about ELHSI (10 minutes)

Site Visit Exhibit 7: Example Agenda

This is a real-life example of an agenda from a site visit for a Member of Congress.

Visit with Congresswoman Rosa DeLauro

Friday, September 4
10:30 a.m. to 11:30 a.m.
Whalley Terrace
New Haven

AGENDA

10:30 a.m. – 10:40 a.m.	**Welcome and Introductions**	Alison Cunningham Executive Director Columbus House
10:40 a.m. – 10:45 a.m.	**Update on Federal Services Funding Request**	Kate Kelly Reaching Home Campaign Manager Partnership for Strong Communities
10:45 a.m. – 10:50 a.m.	**How Supportive Housing Worked for Me**	Walter Franklin Supportive Housing Resident
10:50 a.m. – 11:15 a.m.	**Update from Washington and Q & A**	Congresswoman Rosa DeLauro
11:15 a.m. – 11:30 a.m.	**Tour and Conversation**	Alison Cunningham

Site Visit Exhibit 8: Sample Briefing Memo

You should fax or email this after the Member of Congress agrees to participate in a site visit, and at least a week prior to the event.

(PLACE ON YOUR LETTERHEAD)

(DATE)

To: The Honorable (FIRST AND LAST NAME OF MEMBER)
Attn: (DC SCHEDULER AND DISTRICT SCHEDULER)
CC: (DC STAFF MEMBER(S) WHO WORK ON YOUR POLICY ISSUE)
From: (YOUR NAME/ORGANIZATION)
Re: Tour of (PROGRAM NAME) on (DATE)

Dear (SENATOR/REPRESENTATIVE X),

(NUMBER) of your constituents, all key stakeholders in the state's movement to end homelessness, are looking forward to joining you in a tour of (PROGRAM NAME) on (DATE) at (TIME). Participants include (LIST A FEW KEY PEOPLE).

PURPOSE: We would like to express our appreciation for your support of our work and demonstrate the progress we are making in reducing the number of people who are homeless in (COMMUNITY). We would also like to discuss how we can continue to work together to advance solutions to homelessness. Please consider using this event to announce your commitment to (EXPANDING RESOURCES FOR X PROGRAM OR ANOTHER POLICY ISSUE).

DRAFT AGENDA
(BEFORE/AFTER) the tour, we have a short presentation planned, and we would welcome your participation.

(INSERT YOUR DRAFT AGENDA WITH SPEAKER NAMES. IF YOU HAVE INVITED THE MEMBER TO SPEAK, BE SURE TO SPELL OUT WHEN YOU ANTICIPATE THE MEMBER SPEAKING AND WHAT YOU HOPE THEY WILL ADDRESS.)

Site Visit Exhibit 9: Sample Media Advisory

Encouraging representatives from the media to attend a site visit can give both your organization and the Member of Congress positive press attention. Send out a media advisory like the one below to let members of the media know the event is happening.

MEDIA ADVISORY

(SENATOR/REPRESENTATIVE X) to Visit Local Homelessness Assistance Program

WHAT: Visit by (SENATOR/REPRESENTATIVE X) to (PROGRAM NAME)

WHEN: (TIME AND DATE OF SITE VISIT)

WHERE: (LOCATION OF SITE VISIT AND PROGRAM NAME)

WHO: (SENATOR/REPRESENTATIVE X) will meet with (NAMES OF OTHER KEY ATTENDEES) and tour (PROGRAM NAME)

On (DATE OF SITE VISIT), U.S. (SENATOR/REPRESENTATIVE X) will discuss efforts to prevent and end homelessness in (CITY) and will tour (PROGRAM NAME), which (PREVENTS AND/OR ENDS) homelessness for (VETERANS, FAMILIES WITH CHILDREN, AND/OR YOUTH) in our community.

The meeting will allow the (SENATOR'S/REPRESENTATIVE'S) constituents to brief (HIM/HER) on (POLICY ISSUE). Advocates hope to gain (SENATOR/REPRESENTATIIVE X'S) support for federal legislation to (POLICY REQUEST). The meeting will include an overview of how (PROGRAM NAME) serves people experiencing or at risk of homelessness and testimony from a program participant on how (HIS/HER) homelessness was (PREVENTED/ENDED) through the program.

(DESCRIBE YOUR PROGRAM. INCLUDE ANY GREAT OUTCOMES OR COST-SAVINGS DATA. HIGHLIGHT THE NUMBER OF PEOPLE YOU SERVE. EXPLAIN WHICH FEDERAL FUNDS YOUR PROGRAM USES. INCLUDE HYPERLNKS TO THE PROGRAM'S WEBSITE, REPORTS, OR OTHER INFORMATION.)

For more information, contact (NAME, ORGANIZATION, AND PHONE NUMBER/ EMAIL).

Site Visit Exhibit 10: Example Media Advisory

This is a real-life example of a media advisory sent out to members of the local media in advance of a site visit by a Member of Congress.

** Press Release **

Congressman Rob Simmons to Meet With Supportive Housing Advocates in Willimantic

WHEN: Thursday, August 21st at 10:00 a.m.

WHERE: Brick Row Apartments
25 Vermont Drive
Willimantic, CT

WHO: Congressman Simmons will meet with housing advocates, developers, service providers, and public officials

This meeting will allow the Congressman's constituents to brief him on the need for more supportive housing in the 2nd Congressional District, and on efforts underway to address this need. Advocates hope to gain his support for federal legislation to provide more funding for services in supportive housing. The meeting will include an overview of some efforts to revitalize Main Street in Willimantic.

Brick Row Apartments is a supportive housing success story in Willimantic. The development houses tenants who were formerly homeless or at-risk of homelessness, due to mental illness, chemical dependency or chronic health challenges. It combines affordable apartments with on-site access to support services. Supportive housing of this sort is a proven, cost-effective means of re-integrating families and individuals into the community. It is a less expensive and more effective alternative to institutional settings.

For more information, contact Shelby Mertes or Kate Kelly at the Partnership for Strong Communities at (860) 247-4322.

Site Visit Exhibit 11: Sample Thank You Letter

You can use this sample thank you letter as a template for the letter thanking your Member of Congress for visiting your program.

PLACE ON YOUR LETTERHEAD

(DATE)

The Honorable (FIRST AND LAST NAME OF MEMBER)
(U.S. SENATE / U.S. HOUSE OF REPRESENTATIVES)
Washington, DC (SENATE ZIP CODE IS 20510; HOUSE ZIP CODE IS 20515)
Attn: (SCHEDULER) and (STAFF PERSON WHO ATTENDED SITE VISIT) and (STAFF MEMBER WHO HANDLES YOUR POLICY ISSUE, IF DIFFERENT)
FAX: (FAX NUMBER)

Dear (SENATOR/REPRESENTATIVE X),

I want to thank you for taking the time to visit (PROGRAM NAME) while you were home (LAST WEEK). Everyone in attendance greatly appreciates your efforts to advance federal policies that will allow communities like (CITY) to continue preventing and ending homelessness.

As you saw, (PROGRAM NAME) uses a solutions-focused intervention and has ended homelessness for numerous (VETERANS/FAMILIES WITH CHILDREN/YOUTH/PEOPLE WITH DISABILITIES) in our community. (LINK YOUR PROGRAM TO THE POLICY ISSUE. FOR EXAMPLE: STATE WHICH FEDERAL FUNDS YOUR PROGRAM USES AND EXPLAIN WHAT YOU COULD DO WITH ADDITIONAL RESOURCES.)

(SUMMARIZE ANY COMMITMENTS MADE. FOR EXAMPLE: STATE AN AGREEMENT YOU MADE TO SEND MORE INFORMATION OR A COMMITMENT FROM THE MEMBER TO TAKE ANY SORT OF ACTION IN SUPPORT OF THE REQUEST.) As you suggested, I will follow up with (NAME OF STAFF PERSON) in (NUMBER OF DAYS/WEEKS AGREED TO).

Thank you again for your consideration of this request. I look forward to continuing to work with you on this crucial initiative and welcome any request for additional information.

Sincerely,

Site Visit Exhibit 12: Example Thank You Letter

This is a real-life example of a thank you letter sent to a Member of Congress for doing a site visit.

CHOM
Community Housing of Maine

August 18, 2010

The Honorable Senator Olympia Snowe
154 Russell Senate Office Building
Washington, DC 20510-1903
Attn: Henry Hanscom

RE: Thank you

Dear Senator Snowe,

I want to thank you for taking the time to meet with our group from Maine! Each of us is inspired by your leadership supporting legislation aimed at ending homelessness. It is a pleasure to have you representing us! It is evident that you understand the challenges associated with homelessness, and you are committed to solving this issue. Thank you!

Thank you for seeing through your commitment to extending FMAP! This was heroic. We in Maine knew that you were under significant pressure from your party and really appreciate your leadership for families and people who are homeless in Maine! We are very proud of what you did. Thank you.

Thank you as well for your support of McKinney reauthorization. Although the final number will be short of what is needed to fully implement the HEARTH Act, the funding is an increase over last year. The passing of this legislation should eventually bring much needed resources to Maine along with important streamlining of the program, both of which should allow us to more effectively serve people in need across both urban and rural parts of our state. We look forward to having adequate funding to allow this to occur.

As we discussed, the Homeless Prevention and Recovery Program (HPRP) funding has been put to good use in Maine; we are very excited to be able to put into action our statewide Plan to End and Prevent Homelessness, about 60% of which our HPRP initiatives are now addressing. At last count, 3,575 people had been screened, 2895 people had received case management, and 1,531 had received some financial support. For a program operating less than a year, this is way above what we imagined! This program is very efficiently and effectively preventing and ending homelessness, and it is proving that our strategies were correct ones to pursue.

What this funding begins, we need to see through to completion. Where we stabilize people with HPRP funds, we'll need to ensure we keep them stable. This will take rental subsidies for the chronically homeless populations served. That is why we asked for your support of three pieces of legislation all aimed at increasing the supply of Section 8 rental subsidies. First is having 10,000 HUD/VASH vouchers, which are rental subsidies combined with case management for homeless Veterans. Second is having 10,000 housing vouchers for the housing and services for homeless demonstration program (which also seeks $120M for SAMHSA including $15.8M for the services end of this demonstration program). Third, is passage of the Section Eight Voucher Reform Act (SEVRA). As we have indicated, passage of SEVRA alone will put 502 Section 8 vouchers into use in Maine through efficiency. That is enough to stably house all of the homeless Veterans who are currently using our shelter system in Maine – we could effectively end homelessness for this population with this one piece of legislation!

We also discussed the importance of funding (our goal was $1.065B) the National Housing Trust Fund which you worked hard to pass. We are anxiously waiting for those resources to come to Maine!

As you know, permanent supportive housing links affordable housing with an array of services including those for mental health, addiction recovery, general health care, and case management. It is a successful and cost-effective solution to long-term homelessness, and studies across the nation and in Maine have demonstrated this point very convincingly. Maine's Plan to End and Prevent Homelessness calls for a common goal: Permanent housing appropriate to individual or family needs with an adequate support network. Along the way, there is a continuum of care involving emergency shelter, outreach, support services, and rental subsidy to address issues and needs underlying homelessness, transitional and permanent supportive housing when appropriate, and permanent housing that is affordable. We need your leadership to get there.

Those of us in the field know what needs to happen to end homelessness – and with your help we are doing it in Maine. I'm glad we were able to show you the cost study in Maine because we know that supportive housing works. We know affordable housing and services are expensive, but we have definitively learned that their cost is less – often times far less – than the cost of the emergency shelter, emergency room visits, police, EMT, fire and rescue, and other costs related to keeping homeless people in a deteriorating pattern of crises while they stay on the streets or in our shelters. We believe housing is not only cost effective but is an ethical choice allowing a person to end a pattern of homelessness and become a productive member of society. It is the right thing to do, and your efforts are allowing us the precious resources to make it happen.

In Maine, funding for all parts of the equation is too small a commodity and scarce resources are quickly drying up. Your efforts to increase funding to appropriate levels are greatly appreciated. Thank you for your leadership on this important issue! And thank you again for taking the time to meet with us.

Sincerely,

Cullen Ryan, Executive Director

Conducting Successful Congressional Meetings

Meeting with your Member of Congress (Member) is one of the most common and effective forms of advocacy. As a voting constituent, your elected representatives are eager to meet with you and hear what you have to say.

This section of the toolkit will provide you with the tools and strategies necessary to set up a meeting with your congressional offices. It will provide you with step-by-step directions and sample and example materials to help you make the most of a congressional meeting.

Meetings with your Members in their district offices are great during congressional recesses and an excellent way to build a relationship with your Members in a slightly less formal setting. Both DC and local meetings provide a great platform to educate and build awareness. For simplicity, this section of the toolkit will refer primarily to meetings taking place in Washington, DC, but the same strategies apply to local meetings.

You should take time to plan out all of the steps in arranging a meeting and make sure you know what you want to achieve in the meeting.

TIP Coming to Capitol Hill with a specific "ask" is the best way to utilize the time of your Member and his/her staff person. This ask can be to request that the Member vote a certain way on a piece of legislation, provide a specific funding level for a program (this is especially important during the appropriations cycle), or visit a program within your district.

See *Meeting Exhibit 1: Sample Work Plan* (page 57)

Scheduling Your Meeting

This first step to getting a congressional meeting is to send a request to the office's scheduler. The scheduler is often wholly responsible for the Member's schedule, and all meeting requests for him/her go through the scheduler.

TIP Many offices require a written request submitted in either fax or email form. To be thorough, it is best to **submit via both fax and email**. Due to security measures, direct mail takes a very long time to reach Capitol Hill in Washington, DC, making electronic communications the most effective method of scheduling.

Find out who on the staff handles housing/veterans/youth or other relevant issues (depending on the goals of your meeting) by calling the office's main number and requesting that information from the front desk. Copy this person on the meeting request.

TIP Ask for a time or even date range for your meeting. The more flexible you can be, the more likely you are to get in-person meetings with the Member himself/herself.

See *Meeting Exhibit 2: Sample Request* (page 58)

TIP Letters written by board members or other local organizations to the scheduler in support of your meeting will help attract the scheduler's attention, making an in-person meeting with the Member more likely.

See *Meeting Exhibit 3: Sample Letter of Support* (page 59)

The meeting request should include basic information about the issue you hope to discuss with the Member and the approximate number of people who will be attending. It is important to tell the scheduler if you have a big group (more than about five people), so that he/she can find an appropriate space for the meeting.

If you do not hear back from the scheduler within a week or two of sending your request, **do not hesitate to follow up**. Schedulers juggle a lot of requests and last-minute changes, so politely persistent calls or emails can go a long way. Members' schedules often are not finalized until a few weeks, or even a few days, in advance.

Congressional offices may offer to have you meet with a staff person in place of your elected official. It may require a big "push" to get an in-person meeting. Getting others to send letters of support is a great strategy.

Do not be discouraged if you cannot secure a meeting with your elected representative. Meetings with staff can be very effective, too, and the Member may have a last-minute scheduling change or may stop by for a "meet and greet" with you. However, if you are able to secure an in-person meeting, it is usually worth the extra effort.

Deciding Who Else to Invite

It is important to consider the tone you would like to set for your meeting when considering who else to invite. Bringing a consumer will set a more personal tone for the meeting, and the focus will tend toward personal stories and impact; having people the Member knows from the district will make the conversation more casual and focused on things happening in the district. Those you invite also may have their own agendas, so consider your own policy priorities and who in your community may have the same "ask" when considering whom to invite.

Remember that the more constituents and wider diversity of stakeholders you have in your group and the more pressing your issue, the more likely you are to get time with the Member. However, try to avoid large groups (more than 10) to ensure that the meeting stays focused and that each participant is able to connect with the Member or staff person.

Preparing for Your Meeting

In order to make your meeting as impactful as possible, you should research your elected official and have as much knowledge of the issues and their local impact as possible. **The Alliance can help** with this preparation.

Prior to the meeting, **take time to determine one to two policy priorities**. Discussing a long list of policy issues lessens the impact of each, decreasing the chance that your Member will take action on ANY issue. Policy priorities should be related to current legislation or the appropriations process. Find out which committees your Member sits on and if he/she has any other leadership roles in these committees or in his/her respective chamber. Before you decide on your priorities for the meeting, **research what legislation is under consideration** and what is happening in the committees on which your Member sits. The Alliance can help with all of this research.

Make sure you are aware of your Member's legislative history. For example, has he/she been generally supportive of your issues? Is he/she fiscally conservative? Is he/she a veteran? These factors will help shape your discussion and your ask.

See *Meeting Exhibit 4: Example Leave Behind* (page 60)

It is helpful to have short policy briefs to leave behind. They should be as succinct as possible and highlight key points of the policy, its local impact, and what you want your Member to do.

TIP

Be prepared to **thank your Member**. This can be for joining a sign-on letter, voting a particular way on an important issue, providing support in funding certain programs, or attending a recent local event. Thanking your Member shows that you have done your research, are knowledgeable about his/her legislative agenda, and are likely to be appreciative of future efforts.

TIP

Keep it local! Elected officials are concerned primarily with issues relating to their district. **Prepare local anecdotes and facts and figures, and have local materials to leave behind with the Member or staff person**. If possible, these materials should be tailored to the specific Member's interests as much as possible. While Members care about the national impact of federal policy, they are most interested in its local impact.

See *Meeting Exhibit 5: Example Local Materials* (page 62)

To help you stay on task during your meeting and to ensure that you cover all of the topics you wish to discuss, **create a meeting agenda** ahead of time. This agenda should cover a 10-15 minute conversation and should include the main points you wish to raise, as well as answers to questions you think might come up in the conversation.

TIP *Be flexible!* Be prepared to meet with a different staff person at the last minute, or to meet in the hallway, the reception area, or in front of other people. Prepare for a 15-minute meeting, but make sure you have time for a meeting as long as 45 minutes; your Member or the staff person may be particularly interested and want to learn more. As the expert on the issue, you should be prepared to discuss your issues and what is happening in your community in detail.

See *Meeting Exhibit 6: Sample Meeting Agenda* (page 63) and *Meeting Exhibit 7: Sample Do-It-Yourself Meeting Agenda Worksheet* (page 64)

If there are more than two people in your group, decide who will chair the meeting and lead the overall discussion. If you are going with a large group, make sure to assign a discussion leader for each topic to ensure a streamlined conversation in which as many people as possible participate. Discuss in advance what the group will talk about and who will say what. It is important that during the meeting everyone is on the same message and participants are not disagreeing with each other or contradicting statistics or other important pieces of information.

Conducting the Meeting

In-person meetings can be an intimidating experience, especially for first-timers. Just remember, Members of Congress are there because of you! It is their job to listen to constituents. Also remember that **you are the expert** on homelessness. Congressional offices are responsible for a wide array of issues, and homelessness is just one small piece.

Make sure you are early for your meeting. It is always better to have to wait for the Member and/or staff person than to have them wait for you. They may be late, but be patient and grateful nonetheless. If you are not scheduled to meet with the Member, but still run into him/her in the office, **be prepared with an "elevator speech" to quickly convey your message**. An elevator speech is a quick speech that conveys all of your main points and requests. It is very short—like an elevator ride.

As discussed earlier in this section, **keep the conversation** *local*. Emphasize how specific legislation would assist or impact your community directly. **Keeping the focus on local issues will make a bigger impact** on your Member and help to contextualize your issue and place less pressure on you to be familiar with the intricate legislative issues and updates.

Be prepared for questions. If your Member asks a question and you do not know the answer, do not be afraid to say, "I don't know, but I will find out." **Avoid guessing or making anything up**. This is extremely important for building relationships and will provide a great platform for following up when you send an email later to provide a better informed answer. Often during these meetings, you will find that **you are the expert** on these issues and that the congressional office is looking to you for answers. **Do not forget to make the specific policy ask** during the meeting. The Member and/or staff are expecting you to ask them to take a specific action. Do not feel uncomfortable making this ask, even if the conversation seems casual.

TIP

Explain your local materials during the meeting, if there is time. If you are planning on using them as "leave behinds," make sure they are self-explanatory.

After you make your specific ask, you might hear…

- **Yes** – Say: "Wonderful!"
- **Maybe** – Ask: "Is there any additional information I can provide to help you decide?"
- **No** – Ask: "Is there a reason why you will not do this? Is there any information I can provide that might address some of your concerns?" (This is an excellent opportunity to keep the lines of communication open.)

Before the meeting ends, exchange business cards, and **make sure you know whom you can follow up with and *when***. Summarize any commitments made by the congressional office and any questions that you need to answer in follow-up communications. If appropriate to your organization and the topics discussed, take this opportunity to issue an informal invitation for your Member to visit a local homelessness assistance program (see "Achieving Effective Site Visits" for more information).

See *Meeting Exhibit 8: Sample Thank You Note* (page 65)

Meeting Follow-Up

The first thing you need to do following a meeting is to **send a thank you note within a few days after your visit.** Once again, summarize commitments made by the congressional office or yourself, and answer any questions that they may have had.

The most important thing following a congressional meeting is to **keep the relationship going**. Remember to take note of what topics the people you met with were particularly interested in, and use these as a guide for providing further information. **The Alliance can assist you** in assessing how and when to provide further materials to your office contacts.

Remember These Five Steps for Success

- Find out your Member's position, committees, and legislative history.
- Create a meeting agenda in advance.
- Be flexible and prepared for changes at the last minute.
- Talk about what is happening locally and the local impact of the policy issue.
- Promptly send a thank you note to those with whom you met summarizing commitments made by both you and the office.

Meeting Exhibit 1: Sample Work Plan

To help plan your meeting, consider making a work plan like the one below.
You can even print this work plan out and use it to guide your planning and implementation process.

Policy Issue:
(I.E., MCKINNEY-VENTO FUNDING, RUNAWAY AND HOMELESS YOUTH ACT FUNDING, VETERANS HOMELESSNESS PROGRAMS)

Specific Ask:
(I.E., HAVE YOUR MEMBER PARTICIPATE IN A SIGN-ON LETTER, SUPPORT FUNDING, OR CONTACT CONGRESSIONAL LEADERS)

Goals:

- Strengthen existing relationship (OR BUILD NEW RELATIONSHIP) with (SENATOR/ REPRESENTATIVE X);
- Give the Member an idea of how policies are being implemented in the community;
- Educate and inform congressional offices; and
- Elicit commitments from Members.

Timeline/Tasks

DEADLINE	TASKS	PERSON RESPONSIBLE
4-5 Weeks Prior to Ideal Time for Meeting	• Identify which elected representatives we want to meet with and when. • Create work plan and timeline. • Identify other key stakeholders we want to invite, and ask them if they would attend.	
3-4 Weeks Prior to Meeting	• Fax AND email the DC (or local, if appropriate) office a formal letter requesting a constituent meeting with the Member. Copy the staff person who works on the policy issue that we are highlighting. • A few days later, follow up on our request with a phone call to ensure receipt and progress.	
2-3 Weeks Prior to Meeting	• Continue to follow up with our point of contact in the congressional office until date/time is confirmed.	
2 Weeks Prior to Meeting	• Set an agenda for the meeting (see sample agenda). • Begin research and preparation of local materials.	
1-2 Weeks Prior to Meeting	• Prepare one-pagers and leave behinds on our programs and the policy request. • Do a practice run-through of the agenda.	
1 Week Prior to Meeting	• Confirm date and time again with congressional office. • Confirm number of attendees and give to scheduler.	
During the Meeting	• Make sure attendees arrive early. • Remember to tie the conversation to the community. • Explain what specific action we want the Member to take. • Ask when and with whom we can follow up.	
Within 1 Week Following the Meeting	• Send a thank you letter restating commitments made during the meeting (see sample thank you letter). • Follow up at the appropriate time with the relevant staff member on the policy issue, and answer any remaining questions.	

Meeting Exhibit 2: Sample Request

You can use this sample meeting request as a template for your formal request for a congressional meeting.

PLACE ON YOUR LETTERHEAD

Attention Scheduler

TO: (SENATOR/REPRESENTATIVE X)
ATTN: (SCHEDULER)
CC: (STAFF PERSON WHO WORKS ON RELEVANT POLICY ISSUE)
FAX: (FAX NUMBER)
FROM: (YOUR NAME / ORGANIZATION)
RE: Visit from Constituents
DATE: (DATE)

Dear (SENATOR/REPRESENTATIVE X),

(TRY TO INCLUDE AN ESTIMATED NUMBER OF CONSTITUENTS AND/OR DESCRIBE WHO WILL BE COMING) will be in Washington, DC from (DATES AND REASON FOR BEING IN DC). We would like to meet with (SENATOR/ REPRESENTATIVE X) and appropriate staff to discuss (POLICY ISSUE).

Preferably, we would like to schedule a time between (TIME AND DATE). I will call you to follow up in the next week to identify the best date and time for a meeting with the (SENATOR/REPRESENTATIVE). In the meantime, you can contact me at (PHONE NUMBER AND EMAIL).

(BRIEFLY DISCUSS INFORMATION ABOUT WHAT IS GOING ON LOCALLY, YOUR PROGRAM, OR MORE INFORMATION ON THE ISSUE YOU WISH TO DISCUSS.)

Thank you for your time. I look forward to the meeting in (MONTH).

Sincerely,

Meeting Exhibit 3: Sample Letter of Support

You can use this sample letter of support as a template to provide to other organizations and individuals in your community to send letters in support of your meeting request.

PLACE ON YOUR LETTERHEAD

The Honorable (FIRST AND LAST NAME OF MEMBER)
U.S. SENATE / U.S. HOUSE OF REPRESENTATIVES
Washington, DC (SENATE ZIP CODE IS 20510; HOUSE ZIP CODE IS 20515)
Attn: Scheduler and (STAFF PERSON WHO WORKS ON RELEVANT POLICY ISSUE)
FAX: (FAX NUMBER)

Dear (SENATOR/REPRESENTATIVE X),

I am writing to support the recent request you received to attend a meeting with (TRY TO INCLUDE AN ESTIMATED NUMBER) of your constituents who will be in Washington, DC from (INSERT DATES).

The group would like to take this opportunity to thank you for (THANK HIM/HER FOR SOMETHING SPECIFIC OR GENERALLY FOR HIS/HER SUPPORT), demonstrate the success of local homelessness assistance programs, and discuss how we can continue to work together to advance (INCLUDE A SPECIFIC POLICY ISSUE).

(INCLUDE LOCAL INFORMATION ABOUT HOW THE POLICY ISSUE IS RELATED TO YOUR COMMUNITY'S PROGRESS. FOR EXAMPLE:

- YOUR COMMUNITY'S TEN YEAR PLAN TO END HOMELESSNESS;
- YOUR PROGRAM'S ACCOMPLISHMENTS, HOW MANY PEOPLE YOU HAVE SERVED, HOW MANY PEOPLE HAVE BEEN RE-HOUSED;
- A STORY ABOUT SOMEONE'S HOMELESSNESS THAT WAS PREVENTED OR ENDED; OR
- INTERESTING PARTNERSHIPS.)

The group is looking forward to meeting with you in Washington. Thank you in advance for your consideration of this request. I look forward to continuing to work with you on this critical issue.

Sincerely,

Meeting Exhibit 4: Example Leave Behind

This is a real-life example of a brief that could be left behind with congressional offices after a meeting.

the Network
Supportive Housing Network of NY

Increase Section 8 Funding and Strengthen Rental Assistance Programs

The Supportive Housing Network of New York urges Congress to increase the number of Section 8 rental vouchers and improve the coordination and administration of HUD's rental programs. Congress can accomplish these goals by appropriating funding for 200,000 new Section 8 Housing Choice Vouchers in FY 2011 and enacting the Section Eight Voucher Reform Act (SEVRA).

Section 8 rental vouchers help make housing affordable for over two million households, including over 222,000 throughout New York State. Section 8 is used exclusively for low-income households, predominantly families with children (54%), the elderly (17%) and people living with disabilities (19%).[1] Seventy-five percent of the funds are targeted at households living at or below 30 percent of the area median income ($20,550 for a family of four in New York State).

Across New York State, waiting lists for vouchers are either several years long or closed at a time when demand is escalating due to the economic crisis. Housing affordability continues to be a serious issue in New York. Among the 3.3 million renters in New York, more than half (58%) were living in unaffordable apartments.[2] New York State also continues to be among the states with the highest percentage of their population experiencing homelessness annually: using the most recent data available, New York State ranked 6th highest in the nation with 61,067 persons homeless on a given night. Between the homeless households and those with unsustainable rent burdens, the number of eligible families on the waiting list for Section 8 – in New York City alone – is over 125,000.

There are several pieces of legislation that would increase funding for existing programs and create new rental assistance initiatives, addressing Section 8 shortages in New York City, New York State and across the country.

Section Eight Voucher Reform Act (SEVRA)
SEVRA would create new vouchers to increase affordable housing options and offer much needed reforms to streamline the Housing Choice Voucher program. The legislation, which was approved by the House Financial Services Committee in 2009 and awaits action by the full House, would:

- Authorize 150,000 new vouchers over 3 years.
- Base funding allocations on local public housing agency's actual spending in the previous year and allow unspent balances to be reallocated to areas with greater need.
- Simplify rent calculation, income verification, and inspection processes.

---

[1] Center for Budget and Policy Priorities analysis of HUD RCR Data from December 1, 2007 through March 31, 2009.
[2] NLIHC Out of Reach 2010 report. Unaffordable housing is defined by a household paying more than 30% of their income on rent.

Meeting Exhibit 4: Example Leave Behind *- continued*

Housing and Services for Homeless Persons Demonstration
We ask Congress to provide $85 million in the Transportation, Housing and Urban Development budget to fund the Housing and Services for Homeless Persons demonstration project. Through the project, HUD's Section 8 voucher program would house 4,000 chronically homeless individuals and 6,000 homeless or at-risk families. The rental assistance will be combined with services provided by funding from SAMHSA, Medicaid, and TANF and require an additional appropriation of $16 million within the HHS budget. The demonstration promotes the necessary federal cross-agency collaborations that have the potential to greatly improve homelessness assistance.

HUD-VA Supportive Housing (VASH) Program
Congress should provide $75 million for the HUD-VASH program to house approximately 10,000 homeless veterans in FY 2011. HUD-VASH offers homeless veterans a Section 8 voucher combined with case management and clinical services at community VA medical centers. VA data shows that on any given night in 2008, there were approximately 131,000 homeless veterans in the U.S.

Preservation, Enhancement, and Transformation of Rental Assistance (PETRA)
HUD's PETRA proposal holds the promise of alleviating the nation's chronic underfunding of public housing buildings and reversing the loss of public housing units into the private housing market. Under PETRA, public housing authorities would gain the ability to take private loans on public housing buildings to finance capital needs by converting to a new form of project-based rental subsidy. PETRA would allow up to 300,000 HUD-subsidized housing units, mostly public housing, to convert in FY 2011.

This influx of capital and operating funding is needed to sustain existing public housing, but before the proposal becomes final there are several safeguards which Congress should work with HUD to include:

- Require public housing buildings that receive capital funding for conversion to demonstrate physical plant needs and require applicants to use new funding resources for the physical preservation of properties.
- Establish clearer guidelines to replace physical public housing units, so that a minimal amount of physical units are lost in the transformation.
- Include language that ensures public housing units remain affordable in perpetuity, rather than the 30 year restriction currently recommended.
- Commit adequate service funding to meet the special needs of all tenants currently in public housing.

Meeting Exhibit 5: Example Local Materials

This is a real-life example of local materials that could supplement a meeting with a congressional office.

HUD Homeless Assistance Funding in Illinois' 7th Congressional District

Representative Danny Davis

How HUD Homeless Assistance Funding Benefits the 7th Congressional District

FY09 Dollars	FY09 Beds	FY09 People Served
• 7th Congressional District: $12,142,624 • 31% of Chicago's HUD Allocation	• Total: 2,273 • Dedicated for Veterans: 15 • Dedicated for Youth: 32	• Total: 4,591 • Veterans: 60 • Youth: 339

The Impact on Chicago of Increasing HUD's Homeless Assistance Funding

FY10 Level

- National Total: $1.865 Billion
- Chicago Allocation: $39,177,199

FY11 President's Proposal

- National Total: $2.055 Billion
- Potential Increase for Chicago: **$4 million (10%)**

Our Request

- National Total: $2.4 Billion
- Potential Increase for Chicago: **$11 million (29%)**

For more information, contact:
Nicole Amling, Director of Public Policy
(312) 223-9870, ext. 12
namling@thechicagoalliance.org

Meeting Exhibit 6: Sample Meeting Agenda

The sample agenda below can be used to help you outline the planned agenda for your congressional meeting.

1. **Introductions (BRIEF)**
   - All attendees introduce themselves and their agency and say **one or two sentences** about their involvement with the issue of homelessness. If there are more than 3 people in the meeting, the chair might want to do the introductions.
   - Mention any relationships you have with acquaintances of your senator or representative.

2. **Thank the senator/representative for something**
   - *We would like to take this opportunity to thank you and your staff for your dedication to improving polices that will allow us to better address homelessness in* (COMMUNITY).
   - What is the senator's/representative's history of support on this issue?
   - Thank him/her for something specific. For example, co-sponsorship of or work to support legislation, a federal appropriation for your agency, or visiting your program recently.

3. **Purpose of the meeting**
   - *We are here today to talk to you about the local progress being made in (CITY/STATE) to implement solutions to homelessness and how we can work together to advance our progress. Specifically, we ask that you work in support of (RELEVANT POLICY ISSUE)*. Information about current policies is available on the Alliance's website. The Alliance can help you decide how your Member can have the most impact.

4. **Tell local stories of personal and community-wide success**
   - Members are more likely to support your request when you can demonstrate how much you have accomplished with the resources that you have. This shows that you obviously can put the resources to good use.
   - Share any community or program-related outcome data. Describe what you do, and concretely explain why your program works. Relate the policy issues to your community's success.
   - Tell the story of how you (or an individual/family you know) benefited from a local homeless assistance program.
   - Share information about your community's 10-year plan to end homelessness.
   - Discuss the involvement of interesting partners in the community who have come together in your local movement to end homelessness (i.e., business owners, community organizations, local leaders/ elected officials).

5. **Describe how this policy issue will impact homeless people and programs in your community**
   - Discuss the number and types of individuals, families, or youth who would benefit from the policy, as well as how they would benefit.
   - The Alliance can help you decide what to say if you are not sure.

6. **Make a SPECIFIC ask**
   - We ask that *(SENATOR/REPRESENTATIVE X) (i.e., send a letter, sign a congressional sign-on letter, co-sponsor legislation, etc.)*.

7. **Response from Member/staff**
   - Think about what questions you expect the Member to ask, based on past contact with him/her.
   - If the meeting is with a staff person (not the Member), the staff person will have to ask his/her boss before giving you an answer. Ask when you can follow up with him/her.
   - If the Member of Congress is there, you should ask, "Who on your staff can I follow up with?"
   - If you get a …
     - o **Yes**: Say: "Wonderful!"
     - o **Maybe**: Ask: "Is there any additional information I can provide to help you decide?"
     - o **No**: Say: "Is there a reason why you will not do this? Is there any information I can provide that might address some of your concerns?" (This is an excellent opportunity to keep the lines of communication open.)

8. **Closing**
   - Summarize any commitments made by the Member/staff.
   - Repeat any questions you need to answer in follow up that you couldn't answer in the meeting.
   - Thank them, and ask when and with whom you should follow up.
   - Invite them to see a local program next time they are at home.

Meeting Exhibit 7:
Sample Do-It-Yourself Meeting Agenda Worksheet

You can fill in this worksheet to plan out specific talking points for your congressional meeting.

Meeting with ____________________________

1. **Purpose of the meeting**

____

____

Specifically, we would like the senator/representative to:

____

____

2. **Introductions (BRIEF)**

3. **Thank you**

____

____

4. **Tell stories of success**

____

____

5. **Describe how this policy issue will impact homeless people and programs in your community**

____

____

6. **Make the ask**

We ask that Senator/Representative: ______________________________

____

7. **Response and Questions**

Think about what questions you expect the Member to have based on past support of specific issues or past contact with him/her.

____

____

Think about how you will respond to questions the Member or staff might have.

____

____

8. **Closing**

Thank you for:_________________________________

Summarize any commitments made by the Member/congressional staff. Repeat any questions you need to answer in follow up (that you could not answer in the meeting) and any additional information you need to provide.

Meeting Exhibit 8: Sample Thank You Note

You can use this letter as a template for drafting your note of thanks for the congressional meeting.

PLACE ON YOUR LETTERHEAD

(DATE)

The Honorable (FIRST AND LAST NAME OF MEMBER)
U.S. SENATE / U.S. HOUSE OF REPRESENTATIVES
Washington, DC (SENATE ZIP CODE IS 20510; HOUSE ZIP CODE IS 20515)
Attn: Scheduler and (STAFF PERSON WHO WORKS ON RELEVANT POLICY ISSUE)
FAX: (FAX NUMBER)

Dear (SENATOR/REPRESENTATIVE X),

I want to thank you for taking the time to meet with me while I was in Washington, DC last week. I greatly appreciate your efforts to advance federal policies that will allow communities like (CITY) to continue preventing and ending homelessness.

(RESTATE THE POLICY ISSUE.)

(SUMMARIZE ANY COMMITMENTS MADE. FOR EXAMPLE: STATE AN AGREEMENT YOU MADE TO SEND MORE INFORMATION, A COMMITMENT FROM THE MEMBER TO TAKE ANY SORT OF ACTION IN SUPPORT OF THE REQUEST, A COMMITMENT BY THE MEMBER TO VISIT YOUR PROGRAM, OR AN AGREEMENT THAT YOU MADE TO FOLLOW UP WITH HIS/HER OFFICE AT A PARTICULAR TIME.)

Thank you for your consideration of this request. I look forward to continuing to work with you on this crucial initiative and welcome any request for additional information.

Sincerely,

Engaging the Media

Media engagement is an invaluable tool when advocating for change. Press coverage can help you get your message out to potentially millions, educate the general public about your goal of ending homelessness, and direct information to opinion leaders and decisionmakers—policymakers, community leaders, and funders—who have the power to advance your goals. Building a comprehensive media strategy takes planning, effective use of resources, and time.

The cost of doing media outreach can vary depending on your specific activities, but the benefits are priceless if legislation is passed, new funding streams emerge, or public interest in ending homelessness increases.

Unlike congressional meetings or site visits, engaging the media is usually a less direct form of advocacy. Your work with the media will focus more on educational efforts and getting the attention of your Member of Congress (Member). This is a longer term advocacy strategy that may not always have an immediate and direct effect on getting a Member to take a specific action, but it does have the ability to inform and influence a wider audience. This section will examine some of the common ways and best times to engage the media.

TIP Each newspaper or media outlet likely has its own guidelines for submitting letters and op-eds and connecting with reporters. Make sure you look into these guidelines prior to engaging these sources. This type of information usually can be found on their websites.

Types of Media Engagement

While there are many ways in which you can engage and interact with the media and many mediums in which to do so, such as newspapers, magazines, and online publications, this section will focus primarily on print media (newspapers) and will focus on a few key types of engagement.

OP-EDS

Writing an op-ed, short for "opposite the editorial page," is a direct way to combat the message when the press fails to tell your side of the story. Op-eds can be a great way to make the case for specific legislation or to combat popular misperceptions.

You should use op-eds at times that will have the most impact on the policymaking process. **Directing op-eds in local papers to your senator or representative is a great way to attract that policymaker's attention** and put the issue on his/her legislative agenda.

Op-eds can be particularly effective when there is a timely piece of legislation and a Member has an opportunity to act immediately. Op-eds targeted at particular Members on key committees or subcommittees, particularly chairs or ranking members, can have a huge impact on your Member's support for certain funding levels or a specific piece of legislation.

Unlike most forms of engagement with the media, op-ed campaigns are direct forms of advocacy and can be very effective tools in your short-term advocacy efforts, in addition to your longer term educational efforts.

TIP If you choose to write an op-ed targeted toward your elected officials, make sure to be supportive of your Members. **Thank them for their past support**, and emphasize the importance of the issue locally and the effect increased resources or a piece of legislation would have in their district.

Op-eds are considered most seriously when they seem to portray an underrepresented but widely held perspective in the local community. When considering authors for your piece, tap into local officials, community leaders, or prominent organizations in the area. Board members can be great authors, and multiple authors can also be considered.

Op-eds are also a great way to generally educate the public and your Member on local efforts and successes in ending homelessness.

See *Engaging the Media Exhibit 1: Example Op-Ed* (page 71)

LETTER TO THE EDITOR

Letters to the editor are usually shorter than op-eds and are typically direct responses to stories that have recently run in a paper. They either support the story and praise the reporter or express their disapproval and offer an alternative viewpoint. **A letter should be short, focused, and direct**. With limited space, it is essential to get your message out as quickly and as concisely as possible.

TIP Be quick when responding to an article. Timeliness ensures that your letter will remain relevant, which increases your chances of getting the letter published.

Letters to the editor are ideal for responding to concepts that have been misconstrued or data that has been used incorrectly. They can be used to clarify and/or point out important points the original author missed.

See *Engaging the Media Exhibit 2: Example Letter to the Editor* (page 72)

Letters also can be used to offer a policy solution to a problem raised in the original article. This is a great way to make a more direct link between homelessness and policy solutions.

PRESS RELEASES

See *Engaging the Media Exhibit 3: Example Press Release* (Page 73)

One of the most basic steps for getting the media's attention is to draft a press release. This tool can be used to **announce news or an event, give a statement on a pressing issue, or respond to an opposing view.** A press release is an organization's chance to tell its side of the story and to provide the sound bites that you want to shape the news.

TIP Some organizations issue a press release for every event (i.e., hiring new staff, passing new legislation, or opening a new program). Make sure that you are tactical with this tool. Remember that reporters likely get many releases every day. Be prudent, be direct, and make sure you are saying something new and newsworthy. Have a clear and discernable position, and make that your headline.

Press releases should be attention grabbing, but written similarly to news articles, with the most important information first. They should also include quotes from your spokesperson or other important leaders in your community or field. Be sure to include contact information for your organization's media contact, in case reporters would like additional information.

MEDIA ADVISORY

Media advisories are used primarily for announcing an event that you want reporters to attend and should be sent out a few days prior to the event. Focused on who, what, when, where, and why, the goal of a media advisory is to alert members of the media to an upcoming engagement and its importance.

TIP Make sure to include the names of any important attendees or invitees in your media advisory. **The presence of important local or national leaders can entice reporters to cover the event.**

As discussed in the "Achieving Effective Site Visits" section of this toolkit, if a Member of Congress is attending a local event or program with which your organization is involved, **send a media advisory, and invite members of the local media to attend.** This is a great way to garner good publicity for your organization and your Member.

See *Engaging the Media Exhibit 4: Example Media Advisory* (page 74)

TALKING TO A REPORTER

When reporters call looking for background information or quotes for their stories, it often can be a last-minute and hurried affair. This gives you, as their source, little time to prepare and forces you to be "on your toes" at all times. By doing simple things like staying on top of the latest news and data, having prepared talking points, and designating a spokesperson for the organization (most likely your organization's president), you will be able to handle sudden press calls and give reporters the information they need. Becoming a reporter's source is another great opportunity to shape the story and move it in a specific direction.

TIP Do not "fake it." If the subject is not one you are familiar with, get briefed or defer to the expert. One of the worst things you can do is misrepresent your cause. When speaking with a reporter, take your time, make sure you represent yourself clearly and accurately, and clarify when appropriate. In truth, you are both after the same thing: a clear and accurate story.

Do not be afraid to have a strong opinion—even if it is not the angle the reporter wants to cover. Remember to stick to your own mission statement; do not hesitate to decline to comment on a story if you feel it does not represent your organization's values. You want to ensure that your organization is seen to have a clear and consistent message.

> If you are speaking with a reporter to provide background information on a subject, you can always go "off the record." This means that what you say cannot and will not be quoted in the article. This gives you an opportunity to have a question-and-answer conversation that is more informal and informative with the reporter.

Talking with a reporter may provide you with an opportunity to thank a Member for his/her past work in support of homelessness or urge him/her to help implement policy solutions.

PITCHING A STORY

Reaching out directly to the reporter is often the most effective way to get media coverage, because you can tailor your pitch to the reporter's interests or to previous coverage of the issue and can answer any questions that arise. This method can be used when there is a relevant policy issue that makes the story timely and compelling to certain reporters.

> Pitch your story to reporters who you suspect will be most interested—the ones who have covered similar issues or, if the story pertains to a certain region, those regional reporters or editors whose readers will be most interested. This requires doing some legwork: read your local paper regularly, and find out who covers homelessness and housing for the paper. Keep track of who covers local politics and social issues.

"Cold calling" journalists can seem daunting. However, as long as you are well-informed, are able to quickly and thoroughly present a topic of interest, and answer questions, many reporters will appreciate the story idea.

Pitching a story is a way to raise awareness for a story or topic that might not otherwise receive media attention. If the reporter chooses to move forward with your story idea, you also have created the opportunity to shape the story and be the primary source for information.

Benefits of Working with the Media

As previously mentioned, some of the benefits of working with the media are intangible and difficult to measure on a short timeline. It is important to remember that Members have someone in their office who works exclusively on media and press relations. Often, someone in the office will compile daily news clips from media sources within that Member's state or district and share them with the Member and the other staff people. Any mention of the Member by name in any media outlet is almost guaranteed to make it into these clips and be seen by the Member, his/her chief of staff, or relevant Legislative Assistants (LAs).

Of course, not only will the Member's office see these local articles, but his/her constituents will read them as well. This makes articles, op-eds, and letters to the editor an excellent opportunity to connect your Member with a certain issue on the voters' minds.

As your organization forges partnerships with media outlets, your ability to advocate for change will grow. Education is the foundation of effective advocacy. Raising awareness of your issues among the public and your elected officials is the first and arguably most important step in accomplishing your legislative goals.

By effectively and actively engaging the media, you can achieve your goals of raising awareness about your organization and the issues about which you care most.

Remember These Five Steps for Success

- Use a press release when you have a story, data, or important announcement that is ready to be released to the public.
- Op-eds are a great way to write your own article on a topic of your choosing and target specific Members of Congress.
- Reserve letters to the editor for timely responses to articles you disagree with or issues you would like to clarify.
- Be prepared to talk to reporters with pre-prepared talking points and assigned "experts" on the topics.
- Invite members of the media to your events, particularly if you are having any elected representatives as guests, speakers, or honorees.

Engaging the Media Exhibit 1: Example Op-Ed

This is a real-life example of an op-ed encouraging Members of Congress to support specific legislation.

Federal Resources to Solve Homelessness

July 6, 2010

As the Board of Directors of the Chicago Alliance to End Homelessness, we are helping to lead the movement to end homelessness in Chicago – and we are calling upon Senators Durbin and Burris and our Congressional delegation to help us in our fight.

The groundwork has already been laid. Chicago's innovative Plan to End Homelessness - created by the city of Chicago and the Chicago Alliance - completely revamped Chicago's homeless system to permanently end homelessness for thousands of Chicagoans. We have shown that we can substantially reduce homelessness; in fact, according to Chicago's biannual street count, street homelessness has been reduced by 53 percent since 2005.

What we need now are the resources to continue to serve the most vulnerable members of our community. The recently-passed HEARTH (Homeless Emergency Assistance and Rapid Transition to Housing) Act funds the solutions to end homelessness and will help Chicago continue to implement data-driven, solution-focused strategies to end homelessness in the city. The HEARTH Act needs to be fully funded at $2.4 billion so we can carry on the progress that we've made to improve the lives of all Chicagoans.

Our Members of Congress, including Senators Durbin and Burris, have been very supportive of Chicago's efforts to end homelessness in the past and we call on them to use their leadership once again. Ending homelessness has been a priority for Chicago and Chicagoans for many years and we are counting on our federal lawmakers to carry our voices to Washington once again.

Board of Directors, Chicago Alliance to End Homelessness:
Quintin E. Primo III, Board Chair, *Capri Capital Partners*
Randall Doubet King, Vice Chair, *Community Leader/Retired Clergy*
Audrey Thomas, Secretary, *Deborah's Place*
Prudence Beidler
Arturo Valdivia Bendixen, *AIDS Foundation of Chicago*
Lester Coney, *Mesirow Financial*
Lonnie Fulton, *Consumers Commission*
Judy Gold, *Perkins Coie, LLP*
Juanita Irizarry
Chris Kennedy, *Merchandise Mart Properties, Inc.*
Richard Klawiter, *DLA Piper, LLP*
Jim Reynolds, Loop Capital Markets LLC
Diane Primo, *Michael's Chance and Hope's Chance*
Debbie Reznick, *Polk Bros. Foundation*
Judith Rice, *Harris Bank*
Jason Tyler, *Ariel Investments, LLC*

CHICAGO ALLIANCE TO END HOMELESSNESS
A Home for Everyone

Engaging the Media Exhibit 2: Example Letter to the Editor

This is a real-life example of a letter to the editor about a specific news article on the issue of homelessness.

TO: Wichita Eagle (Kansas)
letters@wichitaeagle.com
316-268-6370

Dear Editor,

I was heartened to see you highlight the efforts in Sedgwick County to end homelessness ("Homeless no more: 25 people get a place to live" May 6, 2009). It's especially nice to learn that the officials in Wichita and Sedgwick County are aware of the importance in providing Housing First – the best practice in providing assistance to those experiencing homelessness. Time and time again, we've seen that providing permanent supportive housing - housing coupled with supportive services – is not only effective at ending chronic homelessness, but cost-efficient as well.

In these challenging economic times, we see families and individuals all across the country facing unforeseen obstacles jeopardizing their health, homes and well-being. Moreover, we see now that an increasing number of those who were already living on the economic margins of society before are now ever closer to losing their ability to maintain stable housing. There are approximately 600 homeless people in the Wichita/Sedgwick county area alone; the National Alliance to End Homelessness projects more than one million more people will become homeless as a result of the current economic crisis.

But homelessness is a solvable problem, for Kansas and for the country – and the solution is to provide rapid re-housing first and foremost, and other services as needed after that. We can and must do more to address this social problem facing our country. I commend the officials in Kansas for their efforts to address homelessness in their state. Certainly, we can all benefit from their example.

- Nan Roman
President and CEO
National Alliance to End Homelessness

Engaging the Media Exhibit 3: Example Press Release

This is a real-life example of a press release an organization could send out after a major event, such as the release of a report.

FOR IMMEDIATE RELEASE
November 9, 2010

Contact:
Phyllis Chamberlain, Virginia Coalition to End Homelessness
703-861-0102, phyllis@vceh.org, www.vceh.org

Virginia Coalition to End Homelessness
VCEH

REPORT FINDS PERMANENT SUPPORTIVE HOUSING IS A SOLUTION TO HOMELESSNESS FOR MANY WITH SEVERE HEALTH ISSUES

Burke, VA—Housing with supportive services demonstrates success in reducing homelessness and taxpayer costs, according to a new report from the Virginia Coalition to End Homelessness (VCEH). An assessment of Virginia's response to homelessness finds permanent supportive housing to be effective and decreases costs, yet continues to be an underused alternative for reducing homelessness.

"Expanding permanent supportive housing programs in Virginia can help end homelessness for those who are cycling between the streets, emergency shelter, jails and prisons, and hospitals," said Phyllis Chamberlain, Executive Director of the Virginia Coalition to End Homelessness. "For many who have lived on the streets for long periods of time, permanent supportive housing is a life-saving intervention that can provide the stability they need to get off the streets for good."

Permanent supportive housing combines affordable housing with support services to help people with severe disabilities live in stable housing and increase their self sufficiency. A study of existing Virginia programs showed high success rates with 85 to 100 percent of tenants not returning to homelessness.

Multiple studies have demonstrated cost savings to public systems such as hospitals, shelters, and the corrections system. A comparison of daily costs of Virginia Supportive Housing's (VSH) program shows this type of housing plus services costs $49 a day versus jail at $70 per day or an adult psychiatric hospital at $598 per day. VSH also found a 66 percent decrease in emergency room costs after people were living in permanent supportive housing.

Permanent supportive housing can help to end chronic homelessness for those living on the streets for long periods of time with mental illness, chemical dependency, and other long-term disabling conditions. Permanent supportive housing is a permanent solution to stop the cycle of homelessness.

VCEH recommends a short-term goal of creating 1,000 new units of permanent supportive housing in the next three years — a modest beginning to moving towards a long-term goal of creating 6,800 new units of permanent supportive housing in Virginia. This number of new units will reduce taxpayer costs, end chronic homelessness, and reduce jail and prison recidivism. Permanent supportive housing can be expanded by using already existing housing and service programs and funds, as well as prioritizing permanent supportive housing with any new federal, state, or local funding.

Download the report The State of Permanent Supportive Housing in the Commonwealth of Virginia from http://www.vceh.org/support.html.

About the Virginia Coalition to End Homelessness: The Virginia Coalition to End Homelessness (VCEH) is the statewide nonprofit organization dedicated to preventing and ending homelessness in the Commonwealth of Virginia through community collaboration, capacity building, education and advocacy. VCEH promotes the understanding that there are solutions to homelessness and works with communities to shift the response from short-term to long-term solutions to homelessness. Learn more at http://www.vceh.org.

Engaging the Media Exhibit 4: Example Media Advisory

This is a real-life example of a media advisory an organization could send out in advance of a major event, such as an awards ceremony.

National Alliance to End Homelessness

FOR PLANNING PURPOSES April 21, 2010

National Alliance to End Homelessness Honors
Former Red Sox first baseman Maurice "Mo" Vaughn,
Washington Sen. Patty Murray, UNITY of Greater New Orleans,
and Virgin Mobile USA and Virgin Unite
with its 2010 Achievement Awards

WHO:

- Maurice Samuel "Mo" Vaughn, former Major League Baseball first baseman turned housing advocate.
- US Sen. Patty Murray, (D – WA).
- Judy Woodruff, PBS senior correspondent, will host.
- Mighty Sam McClain, musical guest, will perform.

WHAT:
Leaders in homelessness policies and programs will be honored at the annual 2010 National Alliance to End Homelessness (Alliance) Awards Ceremony. The Alliance will honor **Vaughn** with the *John W. Macy Lifetime Achievement Award* for his work to create affordable housing and community partnership; **Sen. Murray** will be awarded the *Public Sector Achievement Award* to honor her work advancing ways to prevent and end homelessness; UNITY of Greater New Orleans will be awarded the *Nonprofit Achievement Award* for their steadfast commitment to re-house vulnerable residents after Hurricane Katrina; and **Virgin Mobile USA** and **Virgin Unite** will be awarded the *Private Sector Achievement Award* for launching the RE*Generation campaign, a movement to raise awareness about homeless youth.

WHEN: Thursday, April 22 at 7:30 p.m.
WHERE: John F. Kennedy Center for the Performing Arts
2700 F Street NW
Washington, DC 20037
CONTACT: Catherine An, 202-942-8297
can@naeh.org

Mobilizing Others

So far, this toolkit has described ways in which you can take action; however, a big part of advocacy also involves encouraging others to take action. Where one voice can be effective, dozens of voices can be exponentially more so.

This section of the toolkit suggests key strategies and tips for mobilizing your network, colleagues, and others to get involved in advocacy.

Whom to Mobilize

The first thing to consider when you begin efforts to mobilize others is whom your target advocates will be. In many cases, you will choose to **target your organization's email network.**

If your organization has a large email network or multiple email networks, carefully consider which portion(s) you target. **Certain groups of individuals who are more affected by certain policies or issues may be more interested** in taking action on those topics, and you should try to target your advocacy requests accordingly. For example, people on a Continuum of Care email list will be more likely to care about funding for HUD's McKinney-Vento Homeless Assistance Grants program than others in the community might be.

Think about other places to find advocates, too. Colleagues, friends, and family can all make great advocates. Consider partner organizations or coalitions to which your organization belongs. For example, you might **consider mobilizing people at a local Continuum of Care or homeless services coalition meeting**. You also should consider reaching out to your social media networks, including blogs, Facebook, and Twitter. See "Mobilizing through Social Media" in this toolkit for more information on this strategy.

TIP

Many organizations find it helpful to **create separate email lists focused specifically on advocacy**. Individuals in these networks have identified themselves as being interested in taking action and are therefore more likely to respond to your requests for them to advocate.

Key Strategies

Mobilizing others can be challenging, but it does not have to be overwhelming. Below are some key strategies and principles that are helpful to remember when you ask others to take action on behalf of an issue.

EXPLAIN WHY ACTION IS NEEDED NOW

Most people are extremely busy and do not set aside specific time for advocacy activities. As a result, you often have to make the case to them as to why they should take action. If possible, describe the specific impact that a piece of legislation or set of resources could have on their community, program, and clients.

Make sure the individuals you are mobilizing understand why their advocacy is needed *at this time and on this issue*. **Express urgency and assign deadlines**. Illustrate why the issue is time-sensitive, and provide an ambitious, yet attainable, deadline as motivation.

MAKE ADVOCACY AS EASY AS POSSIBLE

Advocacy can seem overwhelming and time-consuming to individuals who do not often get involved. To maximize your success at mobilizing others, you should make it as easy as possible for individuals to take action.

One of the easiest ways to simplify advocacy is to **provide sample materials**. If you are asking people to send a letter to a Member of Congress, provide them with a sample or template letter; if you are asking them to make a phone call, provide sample talking points.

Make sure people have the necessary contact information (or know how to get it). **Include background information** on the policy issue for which you are asking them to advocate, in case they need it.

When possible, it can be extremely effective to **bring advocacy materials to a coalition or staff meeting**, so that attendees can take action right away. For example, bring sample letters and blank sheets of paper with you, and ask meeting attendees to write a letter before they leave the meeting. You can then email or fax all of the letters together.

BE SPECIFIC

Just as you want to be as specific as possible in telling Members of Congress what you hope they will do, you also want to **have a very specific action step** for the people you are mobilizing. The more clear people are on what exactly they should do, the more likely they are to take action. Provide step-by-step instructions about what you want the individual advocate to do. Be sure to **be as clear and concise as possible** in your request; otherwise, your risk misunderstandings or confusion by advocates.

MAINTAIN A FEEDBACK LOOP

When people take action, they want to know the impact of their efforts. It is important to **maintain a feedback loop with your advocacy networks to let them know the results of their hard work**. Because many advocacy efforts may not see "final" results for months or even years, it is important to report key intermediate developments, such as the passage of legislation through a critical committee or the commitment of a certain Member of Congress to take action.

One of the most important things you can do when mobilizing others is to **track everyone's progress**. You want to keep a record of who takes action, what action they take, and what kind of responses they receive from policymakers to their efforts. All of this information will help you to analyze the impact and efficacy of your mobilizing efforts.

See *Mobilizing Others Exhibit 1: Sample Mobilizing Tracking Sheet* (page 80)

Remember to always thank advocates for taking action. Try to be positive and encouraging about their work and the responses they receive. Positive feedback from you will increase the likelihood that people will want to take action the next time you request assistance.

BE STRATEGIC

Be careful about creating "advocacy fatigue" within your networks. If you ask people to take action too frequently, they may begin to ignore your requests. Try to mobilize your networks for only the biggest priorities or to target specific requests to specific sub-groups of people who might be most affected by a given issue. Conversely, however, do not let your advocacy network lapse. If email network members are asked to take action only once a year, for example, they may lose sight of the big picture effort and feel less connected to the cause.

PERSONALIZED REQUESTS ARE MORE SUCCESSFUL

The more personalized your request to someone is, the more likely that individual is to take action. Sending out an advocacy alert to 5,000 people will in many cases result in fewer people taking action than a group email to 100 people who are particularly committed to the issue; sending individual email requests is often even more helpful.

A personal phone call or email to an individual asking him/her to take action on a specific issue is by far the most effective way to get someone to advocate. However, this can be extremely time-consuming.

TIP Consider sending out an advocacy request to your entire network and then personally following up on that request with specific individuals with whom you have a stronger relationship and who may be more likely to take action.

Consider the trade-off between time and effectiveness when assessing which strategy or strategies would be best for you to undertake to mobilize others.

Creating Action Alerts

One of the most useful strategies for mobilizing others is to distribute action alerts to an email network. Described below are some hints for maximizing the effectiveness of your action alerts. In addition to all of the abovementioned general strategies for mobilizing others, these hints are helpful in deciding how to structure and format action alerts.

TIP Be sure to **emphasize the most important parts of your action alert**, including what action you want people to take, such as through bolding, italicizing, or using sub-titles or different-sized fonts.

THINK VISUALLY

Many people who read your email action alert will skim it rather than read every single word. As a result, it is critical to make sure that the most important parts are emphasized in some way to draw their attention.

You might consider making important words stand out with a strong contrast in color or font between those words and less important words. However, make sure that both colors and fonts are still easy to read in contrast to the background color. **Avoid overuse of bolding, bright colors, or hard-to-read fonts**.

TIP Use terminology and **frame your message in ways that will most appeal to your audience**. For example, instead of asking people to "fight for increased appropriations" for HUD's McKinney-Vento Homeless Assistance Grants program, ask your audience to "fight for increased funding" for the program. Such a simple change in language makes the ask seem more approachable and relevant.

CONSIDER YOUR LANGUAGE

Using strong and appropriate language can increase the likelihood that those who receive your action alert will take action. **Use language that makes the issue urgent and current.** You might consider using a "catchy" or "fun" title or attention-grabbing first line. However, be sure to get to the point quickly.

PUT THE MOST IMPORTANT INFORMATION FIRST

Similar to newspaper articles that generally include the most important, relevant facts first, and background and explanatory information later in the article, an action alert should put the ask and any other critical information at the beginning.

Get right to the point, telling your audience right away what action to take, using clear, short action steps. Many individuals will not read the entire action alert, so it is important to put the most important details first.

However, be sure to provide sufficient information. Never assume that people know something; it is hard for them to take action if they do not understand the issue. **Put background information at the end of the action alert**, after anything directly related to the action needed. That way, it is available for those who need or want additional information, but it will not be in the way of those who do not need it.

See *Mobilizing Others Exhibit 2: Sample Action Alert* (page 80), *Mobilizing Others Exhibit 3: Example Action Alert* (page 81), *Mobilizing Others Exhibit 4: Example Action Alert* (page 82), and *Mobilizing Others Exhibit 5: Example Action Alert* (page 83)

ADVOCACY CAMPAIGNS

One great way to mobilize and engage others is to make them part of a longer term advocacy campaign. Just as putting together a year-long advocacy strategy for your organization can maximize the impact of your efforts, **a longer term advocacy campaign can have more impact and better motivate your network to get involved.**

When individuals can see how their actions now will lay the groundwork for the advocacy campaign's work in a few weeks or months, they may be more likely to get involved. **Providing the long-term vision for your campaign helps people to understand the role and impact of their efforts.**

As a result, launching a small advocacy campaign, rather than just sending around "one-off" action alerts, can increase your ability to mobilize others and maximize the impact of your efforts.

Remember These Five Steps for Success

- Consider whom you should target for mobilizing activities. Choose individuals who are more likely to be interested in the issue.
- Explain why action is needed now.
- Make advocacy as simple as possible. Provide all of the materials and information someone might need.
- The more personalized your requests to individuals are, the more likely you are to successfully mobilize them to take action.
- Always put the most important information first in any action alert.

Mobilizing Others Exhibit 1: Sample Mobilizing Tracking Sheet

You can use this chart as a guide for creating your own mobilizing tracking sheet. Simply fill in the name, contact information, and notes fields for each member of your network who takes action.

NAME	PHONE	CITY/ ORGANIZATION	NOTES: FIELD ACTION TAKEN	NOTES: POLICYMAKER RESPONSE
Joe Smith	202-555-5321	Washington, DC	3/11 – sent email to representative's housing staff member 3/13 – followed up with phone call 3/14 – sent thank you note for agreeing to take action	3/13 – promised to sign congressional sign-on letter

Mobilizing Others Exhibit 2: Sample Action Alert

When creating your own action alerts, you can use this sample format to guide your efforts.

(CLEAR, CONCISE TITLE INDICATING SUBJECT AND APPLICABLE TIME PERIOD IF POSSIBLE)

(SHORT, INTRODUCTORY PARAGRAPH EXPLAINING IN 2-3 SENTENCES THE SUBJECT, WHAT THE LATEST UPDATE IS, AND WHY ACTION IS NEEDED.)

(1-2 SENTENCES SUMMARIZING WHAT KEY ACTION IS NEEDED. BOLD THE KEY PHRASES.)

(SPECIFIC, STEP-BY-STEP INSTRUCTIONS FOR TAKING THE NEEDED ACTION. LINK TO OR ATTACH IMPORTANT SAMPLE MATERIALS OR TALKING POINTS.)

Background
(INSERT 2-3 PARAGRAPHS OF BACKGROUND/EXPLANATORY INFORMATION ABOUT THE LEGISLATIVE UPDATE, THE RELEVANT LEGISLATION, AND ITS IMPACT.)

Mobilizing Others Exhibit 3: Example Action Alert

This is a real-life example of an action alert.

More RHYA Funds Needed

Congress is currently considering whether to provide additional funds for Runaway and Homeless Youth Act (RHYA) programs within the Department of Health and Human Services (HHS) this year. Federal policymakers are holding hearings to analyze the Administration's budget proposal, which would provide the same amount of funding for RHYA programs next year as this year.

Call your senators and representatives TODAY to urge them to support increased funding for RHYA programs.

What You Can Do:

1. Call your senators and representative today. Congressional office numbers can be found by calling the congressional switchboard at 202-224-3121.
2. Ask to speak with the staff members who work on issues related to families and children.
3. Urge them to ask their bosses to send a letter to the HHS Appropriations Subcommittee expressing their support for increased RHYA funding.

Background

The best studies available indicate that over 1 million youth are homeless each year in America. In 2009, the Runaway and Homeless Youth Act (RHYA) programs made over 800,000 street outreach contacts with homeless and at-risk youth, of which less than 41,000 received access to a shelter bed and less than 4,000 received access to housing. Once homeless, many youth face survival on the streets, recruitment by gangs, exposure to drugs, and sexual exploitation by adults.

Turning Away Youth. In 2009, over 7,500 youth were turned away and denied shelter and housing due to lack of resources. Communities would like to serve homeless youth but often lack the necessary options of outreach, drop-in centers, shelters, and housing to intervene.

Cost-Effective Programs. Homeless youth programs are cost-effective alternatives to more expensive out-of-home placements like treatment facilities, group homes, foster care, juvenile corrections, custodial care, treatment, and/or arrests. Additionally, the Office of Management and Budget's Program Assessment Rating Tool process rated RHYA programs as "effective" in 2006 because they made improvements to their evaluation of youth outcomes and had ambitious targets for program measures.

America's homeless youth are denied services because communities lack outreach, shelter, and housing programs. Congress could offer necessary crisis services for homeless youth by **increasing funding for RHYA programs.**

Mobilizing Others Exhibit 4: Example Action Alert

This is a real-life example of an action alert.

Advocacy Alert

Chicago Alliance to End Homelessness

June 28, 2010

Dear Neal,

Thank you for all the hard work this year to make sure Congress knows how important it is to fund McKinney-Vento programs at $2.4 billion in FY 2011. Soon, we're going to start to see the results of all our efforts. But first, we need you to make one more push this week!

Thanks for all you do,
Nicole

Contact Rep. Jackson NOW!

The House Transportation, Housing, and Urban Development (T-HUD) Appropriations Subcommittee is expected to mark up its FY 2011 spending bill THIS Thursday morning, July 1. Representative Jesse Jackson Jr. is the only Chicago legislator on the House Appropriations Committee and he needs to hear our support for full McKinney-Vento funding this week.

- Call or e-mail Charles Dujon in Rep. Jackson's office. His contact information is (202) 225-0773 or charles.dujon@mail.house.gov.
- Tell Mr. Dujon that you support funding McKinney-Vento Homeless Assistance Programs at $2.4 billion in FY 2011.
- Urge him to re-iterate Rep. Jackson's support to Subcommittee Chairman John Olver and Ranking Member Tom Latham.
- E-mail to tell us you did it.

The recently-passed HEARTH (Homeless Emergency Assistance and Rapid Transition to Housing) Act funds the solutions to end homelessness. Without a funding level of $2.4 billion to pay for the HEARTH Act, Chicago could get less funding for new homeless assistance projects next year. Now is the time to be heard!

Quick Links

Our Website
2010 Policy Priorities
Get Involved

Forward this email

About the Alliance

The Chicago Alliance to End Homelessness saves lives and improves the quality of life for everyone by leading an effective and cost-efficient new way to end homelessness.

A Home for Everyone

Mobilizing Others Exhibit 5: Example Action Alert

This is a real-life example of an action alert.

Heartland Alliance for Human Needs & Human Rights

Seven Days Left - Will Congress Save 26,000 Jobs in Illinois?

The clock is ticking and you need to **make your voice heard.**

If Congress does not act by next week - September 30 - tens of thousands of people will be out of work, thousands of employers will not have much needed help, and Illinois' communities will not see the millions flowing into their economy each week that **Put Illinois to Work** has provided.

We are going to share a story a day until Congress acts to illustrate just who will be hurt by their failure. The **Center for Budget and Policy Priorities** will be doing daily updates on their blog as well.

As discussed here before, Congress must continue funding for the Temporary Assistance to Needy Families Emergency Contingency Fund (TANF ECF) so Ricky (below) and thousands of others in Illinois and across the country do not lose their jobs.

Name: Ricky Dumas
Employer: Cutting Edge Electric
Job: Safety Consultant
Status: Will lose his job September 30 without Congressional action.

Ricky Dumas was out of work for well over a year before applying for Put Illinois to Work.

Through the program, Ricky found a position working as a Safety Consultant for Cutting Edge Electric. The position has provided him with training and opportunities to develop skills that will help him provide a better future for himself and his family. He has worked with the team at Cutting Edge to develop safety programs that have helped the small business secure contracts with companies such as CITGO.

Put Illinois to Work has not only been instrumental in the development and expansion of the business, but it has also provided Ricky with the opportunity to gain the training and experience necessary to secure permanent employment within the field. Ricky's supervisor at Cutting Edge has enrolled him in professional development coursework and has trained him on OSHA guidelines. The OSHA training went so well that Ricky was referred to teach an OSHA safety course at the LEED counsel.

Despite everything that the company and Ricky have gained through the program, Ricky's future with Cutting Edge Electric is uncertain. Without a program extension by September 30, the company will be forced to cut Ricky's position and he will be out of work again.

Help Ricky. Help others. **Contact your Members of Congress now.**

Mobilizing through Social Media

The term "social media" encompasses a group of web-based applications that allow for easy sharing of user-generated content. Unlike traditional media outlets, social media can be used by anyone with internet access and is characterized by shorter and faster bursts of information. Social media has become an increasingly widespread tool for connecting individuals with organizations, corporations, products, and government. It can be used to build personal relationships with your members and supporters and to communicate with them practically in real-time. The nearly endless people-to-people connections allow for greater dialogue and dissemination of information than ever before.

While the concept of social media may seem foreign and daunting, online information sharing has been on the rise since the advent of computers. It is likely that your organization has a website and even an online or email newsletter.

Often (and perhaps somewhat surprisingly), the people who receive your newsletter are not the same people who frequent your website, nor are they the same people who are on your social networks. By mobilizing people on all of these different platforms, you can reach a wider audience and help to bridge the gaps between your networks.

TIP The internet has many resources to help explain the benefits of social media networks. There are two sites that might be particularly helpful:

- Article by Beth Kanter, author of Beth's Blog and a nonprofit social media guru: http://mashable.com/2009/05/22/non-profit-social-media/.
- Nonprofit benchmark study aimed at providing tools for nonprofits to measure their social media efficacy: http://www.e-benchmarksstudy.com/socialmedia/.

The more popular social media sites include the following:

- Facebook
- Twitter
- MySpace
- YouTube
- Flickr

While social media is an ever-expanding and ever-changing landscape, for the purposes of clarity and ease, this toolkit will focus only on Facebook, Twitter, and blogs. As of this printing, 86 percent of nonprofit organizations have a presence on Facebook, and 60 percent have one on Twitter. These three platforms are excellent tools to keep partners, members, and the general public interested and engaged in your organization.

Social Media and Your Organization

If your organization has not yet become involved in social media networks, this section will provide some insight into the basics of these networks and how best to use them.

GETTING STARTED

The social media universe has garnered a large amount of attention in recent years, especially from organizations looking to leverage these communications tools to reach their constituent bases. The prospect of connecting directly with partners and supporters can be quite alluring.

However, before starting your accounts, be sure to consider your organization's mission and its specific communications and advocacy goals. Remember to ask yourself the following questions:

- What are we trying to achieve on our social networks?
- Why are we choosing social networks over other mediums? Are they somehow better?
- How will we determine the efficacy of our social media efforts? Will we track the number of followers? Tweets? Comments? Actions taken?
- How do these social media efforts fit into our organizational goals and mission?

Once you have answered those questions for yourself and your organization, you will be better equipped to tailor your social media efforts in a more strategic and concerted way.

FACEBOOK

With over 500 million users, Facebook is the largest social network in the world. About 1 in 14 people on the planet have a Facebook profile. There are four ways that an organization can utilize Facebook:

1. *Fan page:* This is the way most organizations have chosen to represent themselves on Facebook (examples include the White House and many nonprofits).

See *Social Media Exhibit 1: Example Facebook Fan Page* (page 90)

2. *Cause:* This is a fundraising-focused way to represent your organization online and is designed mostly for charitable organizations (including the American Red Cross). While the prospect of connecting with millions of potential donors may seem attractive, the most recent social media survey authored by the Nonprofit Technology Network suggests that, on average, nonprofits raise only about $1,000 on Facebook.

3. *Group:* Facebook recently re-launched a new and improved way to use Facebook Groups. Groups allow you to tailor access (it could be a private group that requires membership approval or a public group that anyone can join) and to identify specific "administrators" to control settings and conversations in the group.

4. *Profile:* This option is great for organizations with charismatic presidents or executive directors. You can create a Facebook profile—just like your own personal profile—for your organization. If you choose to go this route, it is highly advised that you choose a person (likely your president, CEO, or executive director) to be the face of the organization.

See *Social Media Exhibit 2: Example Facebook User Profile* (page 91)

See *Social Media Exhibit 3: Example Twitter Feed* (page 92)

TWITTER

Twitter is a much more limited social network involving short (140-character) messages. Anyone, including non-users, can view your "tweets" (your posts on Twitter), and your tweets automatically will display on the homepage of users who subscribe to your posts.

Twitter often is seen as a high-frequency, high-volume social network—many organizations tweet as much as once an hour. Utilizing Twitter also will require an understanding of the platform and its specific norms and culture, including vocabulary. (For example, "RT" means "retweet," and "handle" refers to your twitter name). While many see Twitter as lacking intimacy, it can foster new person-to-person relationships. People can engage a person or organization directly (by using the @ sign) and have real-time conversations that they would not otherwise be able to have.

TIP Connect all of your social media networks. Use your website to promote your other social media networks and vice versa. You also can use social media to alert your followers to recent blog posts, to other websites with which you are connected, and to news articles in which you have been quoted, as well as other relevant resources.

BLOGS

Finally, blogs are the most in-depth way on social media to convey information and educate readers. They allow you to focus on specific topics in a less formal or academic way than in papers or on your website. Blogs are also a great place to explain dense policy issues in easy-to-understand ways without explicitly asking readers to take action.

It can be helpful to think of blogs as emails to a close colleague or even a diary (the term "blog" actually comes from the melding of two words: "web" and "log"). The tone is usually more intimate, more honest, and much more casual than standard professional language.

No matter which social media platform(s) you choose to utilize, the most important portion of your profile will be the content you disseminate. Make sure that you select the platform that will best carry the content you wish to share.

When to Use Social Media Networks for Advocacy

The goal of many organizations' social media networks is to connect with their supporter base. So before your organization begins using social media for advocacy, build up your networks and create an active presence. Supporters can find it discouraging to visit the Facebook fan page of an organization they support and notice that no one has updated it in months. Keeping up an active and daily social network will demonstrate to your followers that your organization is busily making progress.

The same principles that apply to email newsletters and other action alerts also should be applied to your social media networks. Unlike advocacy email lists, followers on your networks have not explicitly expressed interest in policy or advocacy and therefore may become fatigued if you focus too much of your online presence on these issues. **Avoid overuse of and over-reliance on your social media networks for advocacy.**

Timing of advocacy posts on Facebook and Twitter should correspond to any other advocacy or mobilizing efforts your organization is undertaking. It is critical that all of your mobilizing efforts are coordinated and that there are no mixed messages or variance of asks across outlets. Avoiding these mixed messages makes your organization appear more coordinated and makes a bigger impact, eliminating confusion among people who are following you through multiple avenues.

> If an email action alert urges people to take a specific action (such as writing a letter to their Member of Congress), any posts on your social media networks should request that users **take the same action.**

Blogs—in which posts are usually longer and added less frequently than in other social media—are a great place to supplement your asks and action steps with more background information on the issue and the impact a certain policy or piece of legislation could have. Blog posts do not necessarily need to be related directly to a specific mobilization effort, but may be part of a larger, ongoing effort to educate the public and your networks on federal policy issues.

See *Social Media Exhibit 4: Example Blog Post* (page 93)

TIP Make sure to follow up on anything someone else posts on your Facebook page or any Twitter re-tweets by someone else of your own tweets. People may respond to your posts with questions or concerns, and it is important to be able to respond quickly to ensure that people are clear on what action they should take.

Effective Mobilizing through Social Media

The same principles that apply to any efforts to mobilize others can and should be applied to your social media networks. When asking people to take action, ensure that they have all of the information they need, including any relevant names, numbers, and data. The less information people need to find on their own, the more likely they are to take action.

Social media networks should be used to enhance your mobilizing efforts elsewhere, not to replace them. They should be used in conjunction with email blasts or phone calls to spread the message to a wider audience.

See *Social Media Exhibit 5: Example Facebook Posts* (page 94)

Unlike emails or phone calls, Facebook, Twitter, or blog posts cannot be individualized, so make sure the information included within them is relevant to all followers.

TIP Remind people to follow up with the relevant person in your organization each time they take action. This will help you to evaluate the efficacy of your social media network efforts and maintain a feedback loop with your followers. It also may help you to identify new advocates who are likely to take future action.

The tone on social media is often much more casual and personal than in email blasts or newsletters. Therefore, make sure your advocacy posts are in line with this tone. **Avoid jargon that may be difficult to understand, and make the asks and action steps easy and approachable**.

Because social media networks can be so large, it can be difficult to track advocates' actions, so it is important to make a concerted effort to monitor steps taken.

Further Ways to Use Social Media to Mobilize

Social media should be used primarily to build a community around your organization and to create a dialogue between your organization and its followers. There are many ways in which you can get people involved in your organization and its activities.

See *Social Media Exhibit 6: Example Social Media Alert* (page 95)

Contests are a great way to mobilize people in your networks. They can be fun and creative, such as a photo contest for your website, or more advocacy-focused, such as a letter-writing campaign to Members of Congress.

Whether or not these contests or other activities are advocacy-related, they are a great way to see who is willing to make the extra effort for your organization. These people can be reached out to in the future when needed for advocacy efforts, as they already have expressed an interest and a willingness to take action.

Including Social Media in Your Long-Term Goals

While it is true that maintaining a healthy presence on a variety of social networks can be time-consuming, it also can be extremely rewarding and effective. If your organization chooses to pursue social media either for advocacy or educational purposes, make sure you are strategic in your use of staff time and other resources. Avoid launching social media networks and campaigns just for the sake of doing so. Instead, use them as tools to enhance and integrate your educational and advocacy efforts elsewhere.

TIP Set goals for your social media outlets, such as reaching a certain number of followers or getting a specific number of people to take action, and integrate these efforts into your overall strategic advocacy plan. For more information, see the "Developing a Strategic Advocacy Plan" section of this toolkit.

As with all advocacy efforts, defining or quantifying success may be difficult. Make sure to assess your presence on these networks periodically to evaluate whether your followers are active and interactive, as well as how to get them to be even more so.

See *Social Media Exhibit 7: Example Social Media Network Survey* (page 96)

Social media is an excellent way to share and exchange information and to connect with people who otherwise might not be involved with your organization. Creating robust social networks can be an invaluable tool for mobilizing others and is an increasingly important way to educate and inform the public.

Remember These Five Steps for Success

- Determine your goals first and foremost, and let them guide you to the social media platform and metrics best suited to your organization.
- Build up an active and interactive presence on a variety of social media networks.
- Follow up on any comments or responses, and make sure to interact with potential advocates.
- Avoid oversaturating social media networks with advocacy-related posts.
- Use contests or other interactive web-based events to keep followers involved and to identify potential new advocates.

Social Media Exhibit 1: Example Facebook Fan Page

This is a real-life example of a fan page on Facebook, which your organization could use to promote itself and advocacy opportunities.

Social Media Exhibit 2: Example Facebook User Profile

This is a real-life example of a user profile on Facebook,
which your organization could use to promote itself and advocacy opportunities.

Social Media Exhibit 3: Example Twitter Feed

This is a real-life example of a Twitter feed, which your organization could use to promote itself and advocacy opportunities.

Social Media Exhibit 4: Example Blog Post

This is a real-life example of a blog post on an advocacy issue.

TANF ECF Needs You NOW!

2nd August, 2010
Written by Mindy Mitchell

Today, Mindy Mitchell writes about the TANF Emergency Contingency Fund, which is set to expire on September 30, 2010.

It's been called the "best kept secret" of the federal stimulus plan, and unless the Senate acts soon, it will be over in just a couple months, which would be devastating for families who are homeless or are just barely avoiding homelessness. It's the Temporary Assistance for Needy Families (TANF) Emergency Contingency Fund (ECF), which the Alliance has advocated using to support homeless families since the ECF began, and which I have been exploring for almost two months now as part of my summer internship.

Because I worked directly with homeless families in my former (pre-law school) life, it's been more than a little frustrating for me this summer to learn how easily such a good program—for homeless families, for all families who are struggling economically, and for whole communities—can fall through the legislative cracks. The TANF ECF extension was originally part of H.R. 4213, which failed to pass the Senate until it was stripped of all its elements except unemployment insurance (UI). No one seems to know now what will happen to all the other vital programs that were originally included in H.R. 4213, but the Alliance is organizing an advocacy push in hopes of getting things moving again. The stated concern of some senators about the original legislation was the contribution to the federal deficit (which may not be warranted, btw), but now that UI has been passed on its own, the rest of these programs (including ECF and the National Housing Trust Fund) are all offset and won't contribute to the deficit. So what's the hold up, especially when this program is helping not just struggling families but struggling businesses?!

See, that's the really cool thing about ECF, which CNN Money called "A stimulus program even a Republican can love"! TANF ECF can be used by states in any of three categories: basic assistance (to supplement the regular assistance programs TANF already administers), short-term, non-recurrent benefits (a wide range of preventive and supportive benefits, available even to families who aren't already receiving TANF), and subsidized employment.

Many homeless providers are taking advantage of ECF's short-term benefits to supplement and stretch their HPRP funds, including Utah's The Road Home. And more and more states are taking advantage of the subsidized employment possibilities made available to them through ECF to create some 200,000 jobs, which can be used to serve families at higher income cut-offs than the regular TANF assistance program. These jobs are the real stars of the ECF show because they enable families who are homeless or are struggling economically to improve their incomes (which is an essential part of ending homelessness, of course) and they benefit local businesses and organizations that are also struggling in these tough economic times by allowing them to expand and employ more workers without expending capital that many of them don't have right now.

It's a win-win situation for entire communities like Perry County, TN, whose economy was devastated after its major employer, an auto parts factory, closed. And it can be a win-win situation for even more communities across the country if the Senate would only move this legislation along.

Extending TANF ECF would allow states to maintain the impressive subsidized employment programs they've begun and would allow states that don't have subsidized employment programs to begin to implement them, increasing the well-being of families who are homeless and who are struggling across the country before that opportunity is "Going, Going," and totally gone.

You can save TANF ECF. Call your senators and ask to speak to the person who works on housing issues (you can find your Congressional office phone numbers by calling the U.S. Capitol Switchboard at 202-224-3121). Tell them to make sure their boss works to protect TANF ECF before it's too late.

Social Media Exhibit 5: Example Facebook Posts

Below are real-life examples of Facebook posts regarding advocacy opportunities and events.

UNITY of Greater New Orleans Check out a recent letter to the editor in the TP regarding the homeless. What are your thoughts?

Hide the homeless? A letter to the editor

www.nola.com

Re: "Planning to fail on Esplanade," Other Opinions, Sept. 30. I am stunned by the insensitivity of the proposal to fill the moldering former nursing home on Esplanade Avenue with homeless people. What about the feelings of those of us who are upset, even appalled, by the very sight of the less fort...

October 19 at 11:42am · View Feedback (3) · Share

Rhode Island Coalition for the Homeless 282 people without shelter this winter! Tell candidates you care about ending homelessness http://bit.ly/takeactionri

Take Action: Tell candidates you care about ending homelessness

bit.ly

This election season we're working to ensure affordable housing and homelessness prevention remain key issues for Rhode Island candidates. Tell candidates that you care about affordable housing. Tell candidates that you want to hear their plan to end homelessness in Rhode Island.

October 22 at 11:26am · Share

6 people like this.

Community Shelter Board We just attended COHHIO's advocacy training on the Ohio Housing Trust Fund. Did you know that more than 300,000 Ohio households have benefited from the Ohio Housing Trust Fund since its creation in 1991? It's money well spent. Let's keep a good thing going.

September 22 at 8:10am

Sara Colahan Loken likes this.

Social Media Exhibit 6: Example Social Media Alert

This is a real-life example of an alert, which your organization could send out to promote itself and advocacy opportunities.

Partnership for Strong Communities

Dear ________,

Did you know that the Partnership for Strong Communities is on Facebook and Twitter? If you are a Facebook user, I hope that you will write on our wall and post a picture and a story about your experiences with community building, affordable housing or homelessness. We'd love to hear from you.

If you're a Twitter user, please follow the Partnership for updates and thoughts about housing and homelessness in Connecticut and around the nation. In addition, I've recently started to tweet. Follow me to find out what I'm reading, who I'm meeting with and what important things are going on in the world of housing.

Be sure to check out our various email publications here.

I look forward to seeing you all on our social networks!

Sincerely,

Diane Randall

Diane Randall
Executive Director

Connect with the Partnership for Strong Communities:

Become a fan of the Partnership on Facebook:
Facebook.com/PartnershipforStrongCommunities

facebook

Follow the Partnership on Twitter: Twitter.com/PSCtweets
Follow Executive Director Diane Randall: Twitter.com/RandallPSC

twitter

Subscribe to our YouTube Channel:
YouTube.com/ctpartnershiphousing

YouTube

Social Media Exhibit 7:
Example Social Media Network Survey

This is a real-life example of a survey to send out to a social network to evaluate the effectiveness of an organization's social media efforts and the makeup of its audience.

1. How old are you?

o 12-25
o 26-35
o 36-45
o 46-55
o 56-66
o 66+

2. Which of the following best describes your role in the homelessness field?

o Policy advocate
o Grassroots advocate/activist
o Local Official
o Researcher
o Housing/Service Provider
o Funder
o Media
o Interested citizen
o Other
Other (Please specify) ______________________________

3. What kind of content do you find most interesting/enjoyable?

	Least interesting and/or useful	**Somewhat interesting and/or useful**	**Most interesting and/or useful**
Policy updates	° Least interesting and/or useful	° Somewhat interesting and/or useful	° Most interesting and/or useful
Opportunities to take action and advocacy updates	° Least interesting and/or useful	° Somewhat interesting and/or useful	° Most interesting and/or useful
Media clips about homelessness and housing	° Least interesting and/or useful	° Somewhat interesting and/or useful	° Most interesting and/or useful
Alliance reports, briefs, interactive tools and video	° Least interesting and/or useful	° Somewhat interesting and/or useful	° Most interesting and/or useful
News about Alliance events	° Least interesting and/or useful	° Somewhat interesting and/or useful	° Most interesting and/or useful
Training webinars and virtual discussions	° Least interesting and/or useful	° Somewhat interesting and/or useful	° Most interesting and/or useful

Social Media Exhibit 7:
Example Social Media Network Survey *- continued*

4. Where do you interact with the Alliance? Check all that apply.

o Read your newsletter, Alliance Online News
o Follow you on Twitter {@naehomelessness}
o Follow your status updates on Facebook
o Read your status updates on Facebook
o Use your website for work
o Use your website for general information
o Collaborate with Alliance staff on advocacy efforts
o Collaborate with Alliance capacity-building team
o Collaborate with Alliance research staff
o Collaborate with Alliance Policy staff
o Attend Alliance events

5. Which policy areas are you most interested in?

o Permanent Supportive Housing
o Subsidized Housing
o Affordable Housing
o Homelessness Prevention and Rapid Re-Housing (HPRP)
o National Housing Trust Fund
o Human Services (TANF, HHS, SAMHSA)

6. The Alliance is now disseminating information on all kinds of networks! Which network do you like best/best suits your lifestyle?

o I like checking your website from time to time
o I like reading your posts on Twitter
o I like reading your posts on Facebook
o I like your Blog posts
o I like your weekly newsletters
I like something else {please explain} ________________________________

7. What do you think about the frequency of updates on our social networks?

o Too often: it's overwhelming!
o Just right
o I want more!
o I don't follow you on social networks

Additional Resources

This toolkit is intended to be a comprehensive guide for your advocacy efforts, and all the information you need to be a successful advocate can be found within it; however, as you begin or continue your advocacy efforts, you may find additional resources, such as the ones listed below, helpful for reference. This list is by no means exhaustive, but is intended to supplement the information found in this toolkit.

The resources outlined below are grouped by category for convenience. Some of the resources are referenced in the toolkit's text, while others are additions.

NATIONAL ALLIANCE TO END HOMELESSNESS RESOURCES

- Website: www.endhomelessness.org
- Advocacy Page: http://www.endhomelessness.org/section/policy/advocacy
- Blog: http://blog.endhomelessness.org/
- Legislative Updates Page: http://www.endhomelessness.org/section/policy/legislative_updates
- Policy Page: http://www.endhomelessness.org/section/policy

GOVERNMENT/LEGISLATIVE RESOURCES

- House of Representatives Website: www.house.gov
- IRS Expenditure Test: http://www.irs.gov/charities/article/0,,id=163394,00.html
- IRS Form 5768 to Make Expenditures to Influence Legislation: http://www.irs.gov/pub/irs-pdf/f5768.pdf
- Library of Congress' Legislative Database: www.thomas.gov
- Senate Website: www.senate.gov

OTHER ORGANIZATIONS AND PUBLICATIONS

- Alliance for Justice: www.afj.org
- Center for Lobbying in the Public Interest (CLPI): http://www.clpi.org/
  - CLPI Additional Resources: http://www.clpi.org/get-trained/resources
- Corporation for Supportive Housing (CSH): http://www.csh.org/
  - CSH Tools for Advocates: http://www.csh.org/index.cfm?fuseaction=Page.viewPage&pageId=4333&nodeID=81
- FamiliesUSA Advocacy Tools: http://familiesusa.org/resources/tools-for-advocates/
- How Congress Works, 4th Edition, CQ Press (link to purchase): http://www.cqpress.com/product/How-Congress-Works-4th-Edition.html
- National Low Income Housing Coalition (NLIHC): http://www.nlihc.org/
  - NLIHC 2010 Advocates' Guide (pdf): http://www.nlihc.org/doc/2010-ADVOCATES-GUIDE.pdf
- Seen but Not Heard: Strengthening Nonprofit Advocacy, ©2007, The Aspen Institute (link to purchase): http://www.aspeninstitute.org/publications/seen-not-heard-strengthening-nonprofit-advocacy

SOCIAL MEDIA RESOURCES

- Article by Beth Kanter about Social Media and Nonprofits: http://mashable.com/2009/05/22/non-profit-social-media/
- Blogging Tools: http://www.blogger.com/home; http://wordpress.org/
- Facebook: www.facebook.com
- Nonprofit Social Media Benchmark Study: http://www.e-benchmarksstudy.com/socialmedia/
- Twitter: www.twitter.com