

# Building Advocacy Capacity of Direct Service Organizations

A project of the



## INITIATIVE OVERVIEW

Since their inception, the Health Care Foundation of Greater Kansas City (HCF) and REACH Healthcare Foundation (REACH) have provided their grantees multiple training and educational opportunities to encourage participation in the policy and advocacy fields. REACH and HCF have learned alongside grantees that succeeding in these arenas requires not just increased knowledge but also strong nonprofit organizations with the skills, tools and integrated practices that enable them to leverage their strengths and translate their expertise into community impact.

To this end, the foundations hope to move beyond these training and educational opportunities and provide a small cadre of grantees with the opportunity for intensive technical assistance to work toward more robust engagement in public policy, advocacy, and social change.

The "Advocacy Capacity-Building Initiative" is not intended for grantees that are primarily advocacy organizations; rather it is targeted toward direct service providers, community-based organizations and other collaborative efforts that seek to initiate or develop policy advocacy capacity.

*The proposed outcomes of the initiative are:*

1. Nonprofit organizations will be prepared to effectively advocate for program/policy needs that benefit poor and underserved individuals in the foundations' six-county service area.
2. Participating organizations will complete an assessment, pinpoint their organizations' advocacy strengths and weaknesses, develop a work plan around a particular goal, and gain know-how on effective engagement of their constituency.

Beginning in September 2011, four Kansas City area nonprofit organizations were provided with one year of technical assistance to expand their advocacy activities as part of the Initiative. The four organizations were selected through a competitive proposal process, and all applicants were required to attend an advocacy workshop as a prerequisite. The technical assistance was provided by Melinda K. Lewis, an adjunct professor at the KU School of Social Welfare, nonprofit consultant, and long-time member of the nonprofit advocacy community.

## INTRODUCTION TO CASE STUDIES

This document serves to encapsulate the work accomplished by participants during the initiative's first year. It includes lessons learned across the four participating organizations, as well as case studies of each participating organization.

The purpose of this document is to provide other direct service providers with the knowledge, skills, and practical applications to integrate advocacy and social change activities into their programming.

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**This report examines the experiences of four Greater Kansas City area nonprofit organizations:**

*Participating organizations:*

**El Centro, Inc.**

**reStart**

**ReDiscover**

**Wyandot, Inc.**

*Report prepared by Melinda K. Lewis, LMSW, policy and advocacy consultant and technical assistance provider*

## ■ WHY ENGAGE IN ADVOCACY?

### **Advocacy Complements Direct Services**

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- Fulfilling organizations' visions almost always requires larger social change efforts.
- The collaborations required to advance advocacy issues promote cooperation across sectors, which can yield new programming partnerships, too.
- Telling the story of the clients you serve and the outcomes of your programs brings new attention to your causes, raises the profile of your organization, and opens new opportunities for alliances.
- Increasing client ownership and creating opportunities for clients to advocate for themselves can have real clinical benefits.
- Engaging donors as advocates demonstrates that the organization values them for more than just their financial contributions, which can increase their affiliation with the cause.
- Equipping Board members with tools and responsibilities for advocacy builds on their roles as ambassadors for the organization and its causes.
- Engaging in advocacy can combat staff burnout and energize volunteers and donors.
- Advocacy requires enhancing agency decision-making structures, communications, relationships with external stakeholders, connections to grassroots constituents, staff training and skills, and responsiveness to changing conditions.

### **Your Unique Assets**

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- Policymakers need to understand how systems impact people in their communities. Direct-service organizations' connections to clients and constituents can bridge this communication.
- Direct-service organizations are content experts in the areas of their work and can serve as valued resources for policymakers whose generalist knowledge is complemented by organizations' expertise.
- Nonprofit organizations bring legitimacy and credibility to the policymaking process.
- Direct-service organizations' experiences building coalitions and collaborations in order to fulfill their missions serve them well in advocacy, where working across sectors and silos is essential for advancing broad issues.

## ■ LESSONS LEARNED FROM FIRST-YEAR ADVOCACY CAPACITY PARTICIPANTS

The following lessons are presented to encourage thinking about what this work might look like in other organizations:

- Advocacy can, and should, be defined very broadly; legislative strategies are not the best fit for every direct-service organization, or every issue.
- Inclusive processes of building advocacy agendas are important. They ensure that the ultimate product accurately reflects the priorities of constituents and build stakeholders' investment in the advocacy goals.
- Organizations with approved advocacy agendas have a built-in tool with which to approach policymakers and potential allies; at the same time, leaders need to be able to adapt and respond to new threats and opportunities in a dynamic policy environment.
- The catalysts for advocacy within a direct-service organization can be positioned anywhere within the organizational chart. While CEO/Executive Director support for engaging in advocacy is essential, efforts that weave pieces of the advocacy strategies into different parts of the organization may be more sustainable over the long term.
- Fairly minor changes in how organizations approach advocacy can be very impactful. For example, educating volunteers about the root causes of the problems their services address can build advocates.
- Direct-service organizations cannot and should not expect to drive all of the issues on their advocacy agendas. Direct service organizations can partner with advocacy groups with grassroots voices.
- Advocacy capacity is related to overall organizational capacity. Organizations with adequate infrastructure, strong staff skill and

knowledge bases, established communication strategies, and adequate staffing levels will find taking on any new initiative—advocacy included—more feasible.

- Organizational culture matters a great deal in determining how an organization embraces the

integration of advocacy into its programming. Cultures that encourage critical analysis of underlying problems, build cross-departmental structures to experiment with new approaches, and empower staff have tremendous momentum on which to build.

## CASE STUDY

### EL CENTRO, INC.

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***El Centro knows advocacy.*** The organization was founded more than 35 years ago, initially to provide social services primarily to the Hispanic/Latino community in Kansas City, Kansas. For more than seven years, El Centro employed a full-time policy advocate. As the organization shifted its services in response to the recession, this was unsustainable, but retreating entirely from advocacy roles was not an option.

The challenge was to craft an approach that integrated advocacy into the organization's direct services to allow El Centro to leverage its greatest assets—strong relationships in the Latino immigrant community, committed staff representative of the population served, and collaborations with other organizations active in policy change—for outsized impact on a selective set of issues.

#### **Pivoting El Centro, Inc. to Advocacy Today**

El Centro contracted with a public policy consultant in 2010 with a work plan that primarily focused on building the advocacy capacity of the President/CEO and select staff members, engaging the Board of Directors in advocacy, and developing collaborative partnerships. When the Health Care Foundation of Greater Kansas City and the REACH Foundation made the Advocacy Technical Assistance available, El Centro's application centered on including clients more completely in the organization's advocacy, continuing to build staff knowledge and skills in this arena, and incorporating advocacy into agency communications. The primary technical assistance activities were:

- **Staff Training and Individual Consultation:** El Centro's President/CEO recognized that the organization has potent advocacy strength in the expertise, community connections and passion of its staff. Essential to the success of any organizational transformation is the full support of the executive, and, so, one of El Centro's advantages in weaving advocacy into its work is the leadership of the top executive. Much of the technical assistance

was directed at her ability to effectively advocate, including media preparation and ongoing strategy development. Now, that leader feels more comfortable positioning advocacy within the executive suite, thereby modeling an expanded advocacy presence for other staff.

El Centro identified six program directors/coordinators to participate in advocacy training and planning. Sometimes, this meant working one-on-one with the technical assistance provider to chart an advocacy strategy around a particular issue; other times, it required preparing for coalition meetings, or coaching staff to directly advocate with lawmakers. One of the lessons learned from this work is that the type of issue, and its immediate salience, influences how successfully staff can engage the community.

As an example, when clients of El Centro's domestic violence survivor program, Si Se Puede, reported that their U.S.-citizen children had lost their Supplemental Nutrition Assistance Program (SNAP) benefits, the program director reached out for guidance. Because the issue was urgent for their clients, it provided staff with a hands-on opportunity to apply advocacy knowledge and skills. Because pushing for policy change required a variety of strategies—media outreach, collecting evidence of impact, working with regulators, meeting with legislators, and reaching out to local allies—there were more engagement opportunities.

The technical assistance process also included training for larger groups of staff, including storytelling training to help staff effectively communicate about their organization, as well as training about the state legislative process. These training opportunities helped to prepare the staff to share their newly acquired knowledge with the community.

- **Client Engagement:** Despite a proven track record in encouraging client self-advocacy, difficulties in facilitating clients' participation were among the

primary motivations for the technical assistance application. This continues to be a challenge, particularly because some of the organization's largest programs provide assistance mostly on a one-time basis. The technical assistance process took several approaches to addressing this.

First, there is a deliberate effort to reach out to the organization's entire constituency, framed broadly to include not only individuals who currently receive services, but also former clients (for example, adolescents who were once students at the El Centro's Academy for Children), community volunteers, and the larger Latino/immigrant populations. El Centro conducted focus groups to elicit the input of these groups in the development of the organization's advocacy agenda for 2013 and to invite them to participate in advocacy activities. When El Centro hosted its first legislative reception in more than five years, this time they featured client testimony as well as participation from direct-service staff. El Centro also initiated a voter registration effort as part of its advocacy to strengthen the agency's political voice. While the voter registration did not yield the volume that the organization would have liked, it did send a signal to clients and to staff about the role for client participation in political discussions that affect them.

- Strategic Communications: El Centro, Inc. sees value in advocacy for shaping how others see the organization and its issues. This is an important learning in the advocacy technical assistance process: if we can engage people in advancing their own interests, changing the conversations about important social goods, and bringing new allies into our work, we can succeed, even when we lose on the specific policy aim. El Centro was intentional that advocacy must be part of its reason for being. It's part of what donors are "buying" with their financial support. This means that advocacy must permeate all of the organization's communications—with its clients (quarterly bilingual newsletters that highlight specific policy concerns and opportunities), its staff (inclusion of advocacy discussions in all-staff meetings), its Board (creation of a Board advocacy committee), its partners (legislative previews in advance of the 2012 session), and its donors (highlighting advocacy content on the organization's website).

One of the agency's advocacy strategies was to identify coalitions with interests that align with El Centro's, in order to extend its advocacy reach and increase the likelihood of policy success. Sometimes these alliances are issue-specific, such as with a

business coalition that works closely with El Centro to resist Arizona-style immigration enforcement. Sometimes, El Centro seeks out alliances with an eye toward their long-term advocacy potential, such as new connections in suburban Johnson County, Kansas. And, sometimes, El Centro's staff are slowly shaping the priorities of other coalitions, as when the organization's "promotoras" ensure that immigrants' health concerns are addressed in community efforts around obesity prevention.

## Avenues for Advocacy in El Centro's Future

El Centro recognizes that the evolution of its advocacy approach—from that of a singular, charismatic visionary to a separate, well-resourced program, to a seamless, authentic commitment—is not complete. The organization continually struggles to manage community expectations, as the demands on El Centro's services shift, too. Within this context, the organization remains committed to building a sustainable approach to advocacy that builds on its programs and complements its mission. Among the organization's agenda for continued advocacy capacity development:

- Identification of core client leaders, and the creation of a structure that facilitates their engagement.
- Continued cultivation of advocacy alliances in all of the organization's primary issue areas.
- Engaging Board leadership in advocacy and expansion of the charge of the Board Advocacy Committee.
- Development of advocacy relationships in influential Johnson County.

El Centro entered the advocacy arena by necessity. The mere act of forming an organization to meet the needs of an underserved community was a statement about the imperative of social change. It has seen significant advocacy success over its history, mobilizing a vulnerable community to give voice to its own struggles and, in the process, changing laws that have lasting effects. And it has proven that there is no one "correct" way to do advocacy as a direct-service organization, and that sustainable models for integrating advocacy into programs do not signal a retreat from a commitment to social change. As it looks to the future, El Centro's key stakeholders know that they must build on the proud accomplishments of the past to navigate the present, even as they face a tomorrow they cannot yet see.

# ReDiscover

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ReDiscover Mental Health has a 'Transformation Council,' an Auxiliary, and an entire Quality Improvement Department. These entities reflect a core element in the organization's culture. ReDiscover embraces change, not for the sake of novelty, but to deliver more impact. These internal structures become vehicles for leveraging the organization's assets—passionate staff, engaged consumers, strong community reputation—for social change.

The Transformation Council is comprised of staff members from all levels/departments of the organization who come together to strategize about how to address common concerns that cut across agency divides. The Auxiliary is a group of volunteers and current/former staff members with a mission to support ReDiscover through outreach and fundraising. ReDiscover's Quality Improvement (QI) team analyzes program data to identify gaps and trends. These data inform grant applications and, increasingly, ReDiscover's advocacy agenda. This was a natural precursor to ensuring that advocacy priorities flow from clients, so ReDiscover located the organization's advocacy within the QI Department. While ReDiscover did not have extensive advocacy experience as it approached the technical assistance, it brought curiosity, openness to new ideas, staff empowerment, and a culture that embraces change and reflection.

## **Building on a strategic vision**

ReDiscover's approach to advocacy technical assistance began with a review of the strategic plan, which the CEO describes as a "living tool for our future, not something we put on a shelf." Advocacy was part of the organization's approach to fulfilling some of its objectives. As ReDiscover further developed its advocacy issues and strategies, the strategic plan helped to hone the agency's focus.

ReDiscover's strategic plan, and the goals it identifies, provided a broad rationale from which the leadership could answer the question of "why advocacy?". Early conversations about how advocacy fits centered on advancing policy improvements that affect ReDiscover's clients, and also on how advocacy engagement can enhance the organization's profile and improve alliances.

In practice, this approach meant that staff discussions began with revisiting the strategic plan and connecting advocacy tactics and issues with the strategic direction.

The first introduction of ReDiscover's larger staff to the technical assistance was a root cause and advocacy planning session with supervisors. Here, the CEO outlined

his vision for how advocacy feeds strategic objectives, sparking identification of changes that would have the most direct client impact. For example, ReDiscover plans to increase staff participation in community coalitions in order to reduce the stigma of seeking services, and increase access to services in underserved communities. Similarly, ReDiscover's plans for a speakers bureau and a storybank were framed as leading to more effective internal and external communications. Efforts to address the inadequate supply of mental health providers connect to ReDiscover's hopes to decrease turnover and improve recruitment, both of which are key internal objectives.

Job descriptions for many ReDiscover employees changed to accommodate initiatives identified within the strategic plan, and the leadership took advantage of these realignments to look for connections between responsibilities and advocacy tasks.

With the Board of Directors, the CEO outlined advocacy as a tool with which to pursue the vision of the organization, instead of a time-consuming new initiative. This approach also posits advocacy as something authentic to ReDiscover, rather than a divergence from the standard way of operating. This philosophy is complemented by ReDiscover's roots in community mental health, which views advocacy and empowerment as essential components of service delivery.

Finally, because ReDiscover took this stance from the very beginning, it became part of the way that staff view their work—as advocating for full inclusion of those with mental health concerns and their right to quality treatment — as another tool they bring to the daunting challenge of meeting the needs of those they are charged to serve.

## **Commitment to inclusion and transparency**

To implement advocacy approaches and demonstrate commitment to transparency, ReDiscover invested a considerable amount of their technical assistance in conversations with internal stakeholders, including seven focus groups with staff and consumers, an advocacy issue survey administered to all staff, and careful engagement of agency voices.

This input was used to craft an advocacy goal and strategy plan that outlined ReDiscover's core priorities and their alignment with strategic objectives. The CEO insisted ReDiscover identify a strategy to address every issue that emerged prominently. While this could have deteriorated into a "laundry list," because ReDiscover was careful to prioritize and to articulate where existing approaches could be slightly shifted to align with these needs, the resulting document is an inspiring example

of how an organization can find ways to use its strengths to pursue policy changes that also propel the organization's overall development.

Even once this document had been drafted, however, ReDiscover displayed a commitment to process above product, revisiting key stakeholders in the organization's children and family services to elicit their perspectives on how some of the issues manifest themselves in a different target population. This approach with staff was intended not only to increase their comfort and commitment with the advocacy initiatives, but also to model inclusion and empowerment for their interactions with clients around advocacy, too.

Truly committing to this approach meant that, at times, ReDiscover confronted potentially difficult questions, as when some staff expressed frustration with the response to Missouri's new Medicaid spend-down policy. After ReDiscover lost approximately \$1 million in state support over a year in large part due to Medicaid spend-down requirements, ReDiscover began to require co-payments from those with spend-down obligations.

While ReDiscover did not change this practice in response to staff concerns, leadership resolved to revisit the practice and determine if it should be changed, and initiated a more comprehensive communications strategy to help staff understand the rationale for the rules. They also committed to advocate for changes in Missouri's restrictive Medicaid policies—the root cause of the new billing practice.

The openness with which ReDiscover's leadership listened to staff signaled that it is serious about diffusing advocacy throughout the organizational chart.

### **Leveraging organizational capacity for advocacy capacity**

The relationship between advocacy capacity and organizational capacity was evident in the case of ReDiscover which, despite financial strains was more able to embrace the new tasks associated with advocacy in part because of its relatively strong overall capacity.

In practice, this meant that ReDiscover could dedicate crucial staff time to shepherding the technical assistance process. Adequate capacity also meant that fewer of ReDiscover's staff approached advocacy discussions with a wariness rooted in a history of taking on more responsibilities with fewer resources. Staff were able to move beyond "more money and staff" fairly quickly in identifying advocacy priorities. The organization's relative strength meant that staff was also somewhat less likely to feel disgruntled by agency leadership over periodic layoffs and the perennial climate of insecurity. Over time, these

experiences can breed a culture of mistrust and reticence, counterintuitive to a successful expanded advocacy presence. Beyond the walls of the agency, ReDiscover also has considerable capacity to lend to its advocacy engagement, including leadership in regional collaborations around improving housing options for those with mental illness, active participation in entities with potential to improve ReDiscover's community relationships (such as area Chambers of Commerce), and service-related partnerships that can open doors.

One of the lessons of ReDiscover is that the catalyst for transformation can be situated anywhere. A combination of individual initiative, alliance between advocacy aims and job tasks, and a strong message of confidence from leadership are essential. Because there are so many unknowns, relying on an organization's mission focus, innovation, standards of excellence, and ability to rise to challenges is—most of the time, a good bet. Organizational capacity alone is not enough for strong advocacy. However, some of the key elements of organizational capacity, including adapting to new opportunities and rallying constituents to a challenge, are essential to advocacy.

### **Equipped to succeed in an uncertain future**

Today, ReDiscover has a goal and strategy plan complemented by staff job responsibilities, an increasingly engaged client base, and strong executive commitment.

It has intentionally avoided being locked in to a specific approach or set of priorities. This preference for flexibility is indicative of adaptive capacity—the extent to which the organization will be able to adjust its issues, tactics, and alliances to thrive in an uncertain future. ReDiscover has identified specific future objectives, including continued investment in client advocacy, as well as further development of communications to reshape the community conversation about mental health.

The Auxiliary has several members who have committed to participating in the speakers bureau and to weaving advocacy content into their fundraisers. There is a new Board member orientation to educate Board members about the organization's advocacy approach and issue priorities. To increase ReDiscover's ability to lobby as needed to advance their concerns, the Board of Directors has agreed to file the IRS 501(h) election. Just as the organization continues to revisit its strategic plan, systematically checking through items that have been achieved and modifying those changed by new threats and opportunities, so, too, will ReDiscover's approach to advocacy be ever-evolving in an organization comfortable with the adaptive tasks of continuous reflection and constant stretch.

## reStart Inc.

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Policymakers across the political spectrum agree reStart Inc.'s Executive Director is a force to be reckoned with. The Executive Director is on a first-name basis with elected officials, helps shape the legislative agendas of influential organizations, and has knowledge about policies impacting homelessness that rivals that of a Washington thinktank. Other organizations frequently turn to her for support, both because of her policy expertise and because the organization is known for wielding power. The executive is in the middle of a major capital campaign and helping the organization to a more permanent-housing model, all while dealing with the impact of the recession, an increase in the homeless veterans population and the daily challenges of being on the frontlines of a battle for economic justice.

These constraints forced reStart to look for other structures for its advocacy in order to better leverage the talents of its professional staff, utilize its volunteer corps and find roles for clients.

reStart applied for advocacy technical assistance to learn how to build advocacy capacity beyond the leader. There were obstacles related to capacity in that many staff members who are natural advocates also deal with large caseloads and the trauma associated with individuals in crisis. reStart's work through the advocacy technical assistance process aimed to surround its executive director with a cadre of advocates, root its agenda more directly in its programming, and create structures that institutionalize advocacy.

### **A different way to build an agenda**

reStart releases an advocacy agenda each year, spelling out the issues that the organization will monitor, push or oppose. Issues are separated into tiers according to their relative importance at the local, state and federal levels. This agenda used to be prepared by the executive, whose connections to policymakers and policy monitors across the advocacy landscape informed reStart's consideration of issues. While this agenda attracted recognition and served to influence the agendas of others, few reStart staff and clients were familiar with the items on the agenda, and some did not even know it existed. Because of this, restructuring the agenda process was one of the organization's priorities for technical assistance.

reStart began the process of rethinking its advocacy agenda by convening focus groups with staff and clients, inviting them to identify core barriers to client success. These conversations also included discussions about what policymakers need to understand about reStart and the populations it serves. One of the most important outcomes of these discussions was the identification of some items of significant concerns for clients and staff. Among these are school district truancy policies and university policies that close residence halls during vacations, creating difficulties for homeless youth who have made it to college. reStart has found early receptivity to these items through its network of policymaker relationships cultivated over the years.

reStart viewed the process of inviting clients and staff to contribute to the advocacy agenda as an opportunity for broader participation. Staff identified partnerships with organizations whose advocacy interests might align with reStart's, better tracking of former clients to invite them to share their stories with policymakers, and identification of current clients whose goals might be served by connecting to advocacy efforts. Almost without exception, the clients served and the staff responded positively, excited to have a chance to shape the work.

### **A new way to serve**

While reStart's clients and staff were eager to shape the advocacy agenda, the constraints they face meant that reStart needed to identify and cultivate other allies as well. reStart has an extremely valuable human resource: a large number of committed, regular volunteers—and, in many cases, the institutions they represent.

reStart is served by hundreds of volunteers each year. Congregations prepare meals for guests, college students sort donations, individual volunteers serve overnight shifts at the youth shelter and mentor homeless teens. reStart employs a full-time coordinator to manage the tasks associated with volunteers, and the executive recognized that the organization could do more to fully utilize their talents and connections.

reStart's volunteer coordinator created an orientation program to prepare volunteers for their service and to debrief their experience. With help from the technical assistance provider, the agency created an advocacy volunteer job description and additional information

about reStart's advocacy into this orientation. Now, there are entry points for those whose experience at reStart has sparked an interest in advocating for larger social change. Volunteer engagement in advocacy can take many paths. What is constant is the organization's invitation to a new way to serve and expression of the value that volunteers bring.

reStart also enjoys the support of many corporate and individual donors. While reStart is still exploring how to best engage this group in advocacy, the organization recognizes that these people are important potential allies. They have a clear interest in seeing the root causes of homelessness addressed, too. The challenge is in building the systems and finding the messages that make the invitation to advocate possible.

### **Highlighting clients' voices**

reStart practices its belief in client empowerment. Residents meet frequently to discuss agency rules and navigate the challenges of sharing space. reStart also emphasizes hiring from the communities it serves, employing a diverse staff, some of whom have experienced poverty themselves.

These values led the executive to prioritize elevating client voices. This included the focus groups and also changes in some of reStart's policy communications, including one of the agency's signature events, its legislative reception. This event, held each spring, sees policymakers and their staffs converge on reStart to hear a presentation about the organization's priorities, see programs in action, and serve lunch to guests on-site. In 2012, leadership worked with staff to identify clients who could play a critical role in this event. Because the goal is to capture policymakers' attention in a focused way, leadership worked with clients to identify elements of their lives that illustrate specific policy obstacles that should be immediately addressed.

One youth shared the obstacles that homeless teens face in accessing SNAP benefits because their parents often still claim them as dependents, despite providing no material assistance. Several policymakers in attendance immediately suggested that regulations require parents to prove that the children they claim are receiving support, instead of requiring youth to prove that they are not.

Another client spoke about child care assistance and the impossible expectation that parents prove that they are working before they can receive subsidies, when employers expect that employees will secure child care before accepting a job. Policymakers suggested that there might be ways to pilot an

initiative that would secure child care as part of a transitional living program as an interim measure while parents await final eligibility. These testimonies, from individuals who are working to overcome challenges that contributed to their homelessness, catalyzed policymaker focus on action.

reStart intends to build on this platform for client voice in the collection of stories that illustrate what is difficult for policymakers to understand—the factors that trap people in homelessness. While these plans are still in progress, they will likely include increased emphasis on clients' perspectives in agency communications, additional opportunities for policymakers to spend time with clients, and, perhaps, regular opportunities for clients to discuss policy barriers and potential solutions.

### **Imagining executive transition**

The organization's executive isn't going anywhere—for now. Eventually, however, reStart will face a future without that leadership. The organization is putting in place some of the structures that will ease that transition. This includes inclusion of policy content in the executive's work with direct-report staff, as well as the identification of where job descriptions align with advocacy responsibilities. Some of reStart's future plans include:

- Additional training for staff around specific policy issues and opportunities for policy engagement.
- Possible development of an advocacy task force to leverage Board members' community connections.
- Investment in infrastructure, such as a donor database that allows targeting based on interests and/or districts.
- Continued integration of advocacy into reStart's volunteer efforts, perhaps to include developing advocacy-related volunteer opportunities for interns and other long-term volunteers.

By many measures, reStart's advocacy was far ahead of that of many nonprofit social service organizations before the organization applied for technical assistance. It was—and is—a real player in the policy systems that touch its work. It is often looked to as an example of how direct-service organizations can make advocacy part of the way they live their mission. It also recognized that fulfilling that mission is a task larger than any one person can achieve.



## Wyandot Inc.

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Advocacy is at the heart of the community mental health movement. This means self-advocacy, so that consumers can ensure that systems serve them appropriately; peer advocacy, so that those with mental illnesses have a cushion against the stigma of the larger society; and systems advocacy, so that we build a community response that promotes mental health instead of just addressing crises.

Wyandot Inc., a family of organizations that serves the mental health needs of children and adults in Wyandotte County, Kan., believes that engaging in advocacy promotes mental well-being for their consumers. While many social service organizations struggle to fully involve clients in their advocacy, Wyandot has the advantage of its association with S.I.D.E., an energized and politically-savvy consumer-run organization. S.I.D.E.'s eagerness to educate themselves about policy issues and express their concerns to policymakers can sometimes mean that Wyandot's professional staff has to run to keep up. Furthermore, the organization's culture embraces consumer empowerment, meaning that pivoting to advocacy does not require a radical rethinking of the roles of 'consumer' and 'provider.'

Wyandot, Inc. has had dedicated public affairs staff for a few years, an intentional investment by the CEO. While the "department" is only one-person deep, that staff member has leveraged relationships in Wyandotte County and motivated client advocates to yield significant advocacy successes. The organization has faced challenges in fully utilizing its considerable resources, including the knowledge and skills of its almost 450 full- and part-time staff and the Boards of Directors of its four separate agencies. The organization's primary interests in applying for technical assistance were:

- Create structures to facilitate broader staff participation in advocacy.
- Build an Advocacy Task Force to elicit Board engagement.
- Craft a formal advocacy agenda to guide the organization's work.
- Chart a strategic direction for Wyandot, Inc.'s advocacy that aligns with organizational goals.

### **Building political will—an indispensable public good**

One of Wyandot, Inc.'s primary advocacy objectives is not, specifically, policy-related. The CEO articulated early in the advocacy technical assistance process that if Wyandot is to succeed in the face of mounting budget cuts and increasing strain, it must change the conversation about mental health. It must build

a broader constituency committed to sustaining this community resource.

This means that "advocacy" starts long before the organization directly contacts policymakers. As the public affairs staff describes it, Wyandot, Inc. will have the base of support that it needs when people "view community mental health centers as they do their police department, their schools, and their hospitals—as institutions worth paying for, because it is part of what makes a strong community."

To achieve this, Wyandot, Inc.'s approach to advocacy makes elements of the general public explicit advocacy targets in order to soften the context for more direct policy change efforts. Through the technical assistance process, staff and other key stakeholders identified several strategies that advance their goals and increase the extent to which Wyandot, Inc. and the services it provides become seen as community goods.

- Wyandot, Inc. is developing a speakers bureau and deliberately seeking opportunities to share information about the organization, the challenges of living with mental illness, and the economic and community impact of a strong mental health system.
- Wyandot, Inc. is using existing outreach efforts, such as the Mental Health First Aid (which trains individuals to recognize and respond to mental health crises) to shape public understanding of the incidence of mental illness and the potential for health and healing.
- The organization has developed a storybank to systematically collect and deploy one of its greatest resources—the testimonies of those served—to illustrate policy priorities.
- Wyandot, Inc. is expanding its advocacy footprint beyond Wyandotte County, Kansas, with the development of a regional mental health advocacy initiative designed to increase connections with policymakers by engaging more communities in thinking about what mental health infrastructure means for them.

### **Addressing root causes; increasing the service capacity**

Wyandot, Inc. has struggled to balance its need to advocate for increased funding with a commitment to address the root causes that perpetuate the problems. As one clinical staff member explained, "Some of our clients have developmental delays. Some of them have severe mental illness. And some of them just have poverty." Staff and Board members understand that really making a

difference in the lives of the populations served requires making progress in the areas of employment, housing quality, severe poverty, educational attainment, crime, and physical health. However, agency staff also expressed concerns about Wyandot, Inc.'s ability to be effective on this broader agenda. This will likely continue to be a tension. For the moment, Wyandot, Inc. crafted an advocacy agenda, instead of merely a legislative agenda, a distinction that facilitates the organization's inclusion of strategies such as building public will.

For 2013, this advocacy agenda—yet to be formally approved by the Board of Directors—will likely include immediate priorities such as improved coordination with the county's criminal justice system and funding for uninsured consumers, as well as less tangible concerns, such as reducing the stigma associated with mental illness and mental health treatment.

### **Advocacy is our job—an inclusive vision and diffused responsibility**

One of the challenges for an organization with dedicated advocacy staff is building a structure and an organizational culture that affirms that advocacy roles are necessary and appropriate for all staff. The total advocacy capacity of an organization with an advocacy department can be less than an organization without such a structure. This was the situation with Wyandot, Inc., where the addition of a public affairs director signaled to some internal and external stakeholders that advocacy was to be channeled through this structure. This meant that there were missed opportunities to connect advocacy to programming at the agency. In the eyes of policymakers, the organization's advocacy efforts were limited primarily to the public affairs director and the CEO, which diluted the impact.

One of the primary goals of the advocacy technical assistance was to increase the advocacy knowledge, skills, and activity of other staff, including clinicians, case managers and administrators. The work plan developed incorporated several tactics to build staff capacity and engagement.

- Wyandot, Inc. was explicit that advocacy is far more than legislative change, an important distinction. Some staff members who did not see that a role for themselves in legislative lobbying could connect their work to this larger vision.
- Wyandot, Inc. built an Advocacy Task Force that brought in Board members and key staff members from each of the agencies under the Wyandot, Inc. umbrella.
- Wyandot, Inc. used surveys and focus groups to elicit staff member insights into the tasks associated with integrating advocacy across the organization, including the formulation of an issue agenda and the types of capacity investments necessary to equip staff to advocate.

- The organization reframed some of activities as “advocacy”, to help staff see how their work advances the mission. This includes the speakers bureau and storybank, as well as Mental Health First Aid, participation coalition efforts, and empowering clients for advocacy.
- The technical assistance process included reaching out to the directors of Wyandot Center (mental health care for adults), PACES (mental health care for children), and Kim Wilson Housing, Inc. (housing approaches for hard-to-serve populations) to craft advocacy approaches that fit with their specific visions and strategic directions.
- Wyandot, Inc. invested in training for staff members and consumers in response to their identified needs. This included a session for direct-service providers about the state budget process and ways that staff can be effective advocates within this context, as well as training for consumers leading S.I.D.E. about the legalities of nonprofit 501(c)3 advocacy.

### **Building advocacy capacity means building advocates' capacity**

Wyandot, Inc. understood that investing in advocacy means investing in staff as their primary resource. The public affairs director is positioned to advance Wyandot's own advocacy objectives but also the field of mental health advocacy. During the technical assistance process, a decision was made to expand the organization's advocacy to a regional collaborative that brings together mental health organizations in the area to exert a stronger voice for mental health policy.

Effective advocacy depends on people to move issues, bring in allies, and assert a vision of a better future. And, so, investing in advocacy capacity must mean investing in people. Wyandot, Inc.'s experience in advocacy, especially its ongoing efforts to highlight the voices of those most affected, is beginning to prove this truth; every time the organization interfaces with policymakers, it is the testimony of the consumers that makes the greatest impact on the policy conversation.

Today, the organization's advocacy agenda advances on the strength of the advocates who push it and their understanding of how to best navigate the current context. Going forward, Wyandot, Inc.'s priorities for advocacy capacity will build on its people: continued staff training, support for S.I.D.E. and other consumer-engagement strategies, and ongoing development of the public affairs director as a leading mental health advocate. Advocacy success does not require unlimited financial investment, high-powered political connections, or state-of-the-art communications tools. It demands people and their passions, equipped with the knowledge and skills to leverage their stories for policy change.

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For more information about the project, visit Health Care Foundation of Greater Kansas City, [www.hcfcgk.org](http://www.hcfcgk.org), or REACH Healthcare Foundation, [www.reachhealth.org](http://www.reachhealth.org).