KEY CONTACT OUTREACH TRACKER



Q1 Through 03.19.21			Reason/Topic of Outreach											
KEY CONTACT	HOME DISTRICT	ASSIGNED LAWMAKER	BALA - Signed on as House Original Cospone	COVID Relief \$200M	Welcome to 117th	Build America's Libraries Act (S 127)	Save Education Jobs Act (HR 542)	Social Media Post	Status Q1 Mtg/Convo/Extensive Email Request	Method of Contact	Date(s) Mtg/Convo Request Attempted	Staffer Contacted	Date Mtg/Comvo Completed	Notes
New York												,		
	NY06	Grace Meng (D)	Yes	Not Start	Not Star	Not Starte	Not Start	Not Starte	Contacted	Called & VM on	02.26.21			Could use help
	NY10	Jerrold Nadler (D)	Yes	Not Start	Not Star	Not Starte	Not Start	Not Starte	c Not Startec					
	NY14	Alexandria Ocasio-Cortez (D)	Yes	Not Start	Not Star	Not Starte	Not Start	Twitter	Not Started					03.01.21 - Poste
	NY17	Nita Lowey (D)	,	Not Start	Not Star	Not Starte	Not Start	Not Starte	c Contacted	Staff Email	02.09.21	Mark		
	NY18	Sean Patrick Maloney (D)		Not Start	Not Star	Not Starte	Not Start	Not Starte	c Not Startec					
	NY10	Antonio Delgado (D)		Not Start	Not Star	Not Starte	Not Start	Not Starte	c Contacted	Staff Email	3/9/2021	Matthew		l left a voicema
	NY20	Paul Tonko (D)	Yes	Not Start	Yes	Not Starte	Not Start	Not Starte	c Contacted	Staff Email	02.05.21	Diana		
	NY20	Elyse Stefanik (R-NY-21)		Not Start	Yes	Not Starte	Yes	Twitter	Contacted	Webform	02.08.21			
	NY25	Joseph Morelle (D)	Yes	Yes	Yes	Yes	Not Start	Not Starte	Complete	Staff Email	02.07.21 & 01.29.21	Kaleigh	02.07.21	02.07.21 Email w
	NY26	Brian Higgins (D)		Not Start	Not Star	Not Starte	Not Start	Not Starte	c Not Startec					
Florida														
	FL02	Rep. Neal Dunn (R)		Not Start	Yes	Not Starte	Not Start	Twitter	Complete	Staff Email	02.05.21		3/4/2021	General intro
	FL04	Rep. John Rutherford (R)		Not Start	Yes	Not Starte	Not Start	Not Starte	c Contacted	f Email & USPS	02.04.21			
	FL12	Rep. Charlie Crist (D)		Yes	Not Star	Yes	Not Start	Not Starte	Complete	Staff Email	02.08.21		Set up pho	one call w/ Virg
	FL27	Sen. Marco Rubio (R)	NA	Yes	Yes	Yes	Not Start	Twitter	Complete	f Email & USPS	02.11.21	Susan	03.15.21	03.15.21 - I sta
	FL27	Sen. Rick Scott (R) (Unassigned)	NA	Not Start	Not Star	Yes	Not Start	Not Starte	c Not Startec	Webform	02.11.21			
		KEY ADVOCACY, LLC P 571.30 E. David@KeyAdvoca W. www.keyadvoca	acy.com											

Building Strategic Grasstops

&

Ambassadors Programs



PUBLIC AFFAIRS COUNCIL VIRTUAL WORKSHOP





David Lusk, Founder

David@KeyAdvocacy.com



@LuskyNDC

Federal & state Capitol Hill Day training

Advocacy 365 training

Grasstops & ambassador program launch & development





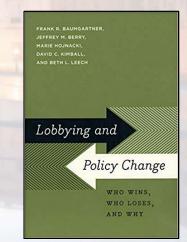


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The End of "Easy Advocacy"

- Congress & the Administration have become more fluid
 - 40 years from 1957-1996: Change elections in 8 of 21
 - Last 20 years of 2001-2020: Change elections in 9 of last 11
 - Impacts leadership, member/committee rosters, staff & agendas
 - Continuous resetting for interest groups pursuing priorities
- Lobbying and Policy Change: Who Wins, Who Loses and Why
 - Those with large budgets or PAC dollars won only half the time
 - Better predictor of success those who built relationships with congressional & government officials, party leaders & President







Are fly-ins effective?

National Journal's Advocacy Fly-In Deck Prepare for Meetings on Capitol Hill February 2018



Fly-ins have increased exponentially in the last decade, and members of Congress consistently say they prefer to hear from fly-in visitors, who often have firsthand knowledge of the impact of government policies.

Ever-Increasing "Legislative Competition"

More Organizations, More Advocates Visiting Capitol Hill





200





700

1,300









7 Organizations

250 (Mar), 400 (Nov)

150

A Pursuit of Relationship-Based Advocacy

























Grasstops & Ambassador Identification

- High-profile advocates
 - Seasoned supporters
 - Recurrent fly-in attendees
- Stakeholder advocacy or PAC reports
 - Most active
 - High-quality activities
 - Engaging in-district

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Grasstops & Ambassador Identification

- Exiting government affairs committee & board members
- Newest members & advocates
- Audience interest
- Stakeholder survey
 - Issue interest
 - Advocacy tactic comfort
 - Relationships willing to leverage
 - Passion for advocacy

KEY ADVOCACY, LLC | P. 571.308.9539 E. David@KeyAdvocacy.com W. www.keyadvocacy.com To become more engaged or to take part in future advocacy sessions like this one, please join the AMA Very Important Physician (VIP) program at https://physiciansgrassrootsnetwork.org/vip



Identify Potential Advocates Assess Relationship Strength Evaluate Willingness to Leverage Relationship Determine Level of Interest in Issue Surface Preferred Engagement Activities

Survey Research Process

Advocate Survey¹

- ~20 questions
- 15 minutes to complete
- Online administration

1) Relationships and Strength

- · What relationships do you have with federal or state legislators?
- · When was the last time you interacted?
- · How frequently do you interact?

2) Willingness to Leverage Relationships

- · Would you contact legislator on the organization's behalf?
- · If yes, how? (phone call, in-person meeting, email, etc.)

3) Interests and Expertise

Which of the following issues are most important to you? (select all that apply)

4) History of Political Involvement

- How politically engaged are you? Have you ever: donated to a campaign, held an elected office, attended a town hall, etc.? (select all that apply)
- · Are you active in other civic or political organizations? (list all that apply)

5) Preferred Engagement Activities

Which activities would you be willing to do on behalf of our organization?
 Contact your local legislator, speak to media, host fundraiser, etc.? (select all that apply)

National Journal "Best Practices in Washington Advocacy: Extending the Enterprise" August 2013



Grasstops & Ambassador Identification

3 Identification & Recruitment Models

- 1. Fully centralized at national organization
- 2. Completely decentralized (full chapter control)
- 3. Hybrid mixture



Grasstops & Ambassador Identification

For Consideration: Grasstops Support Network

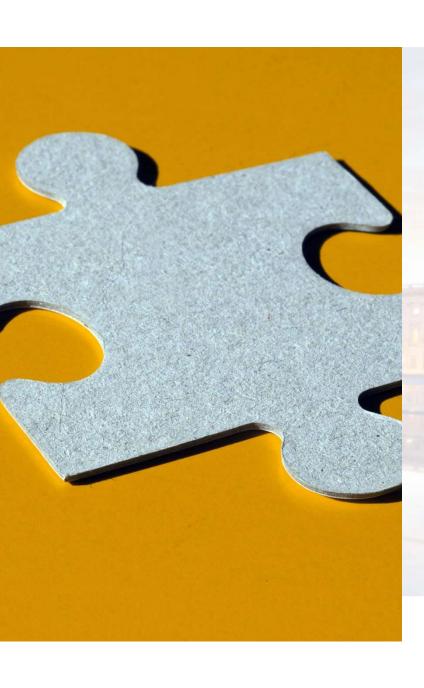
- Later phase rollout
- Second tier advocates
- Deployed less frequently (key contact discretion)
- Deeper bench of available advocates
- Vetted recruiting class for future vacancies



Advocate Motivation

Reliable Cadence of Communication & Accountability

- Stalled policy priorities
- Unforeseen circumstances (Covid-19)
- Builds rapport & personal obligation
- Establishes advocate-staff feedback loop



Advocate Motivation

Recognition, Access & Award Programs

- Advocates & victories aren't created equal
- Highlight successes on monthly calls
- Special "insider-only" access
- Advocate of the Month/Year
- Simple gifts
- Carrot not stick

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Showcase & Share Successes



hank you @SeanMRyan149 for helping us to get the ord out about libraries! We appreciate your supportationalLibraryWeek

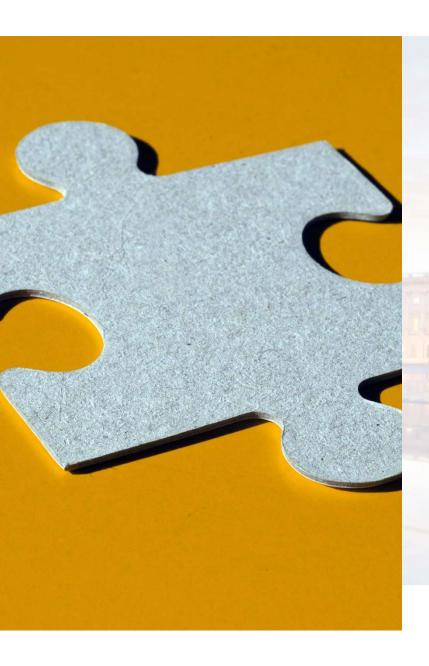
P Senator Sean Ryan @SenSeanRyan - Apr 23, 2020

The buildings may be closed but Erie County libraries are still open- online! W available at every branch & county residents can get an e-library card by siting buffalolib.org

ianks to @buffalolibrary for helping our community stay connected during t andemic



PM - Apr 23, 2020 - Twitter Web App



Advocate Motivation

Compelling Scorecard

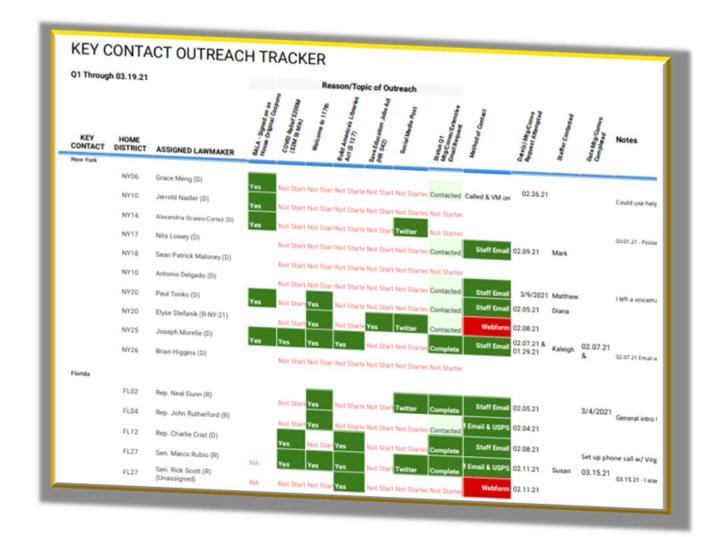
(Gamification - Activity Tracking - Point System)

Four Characteristics

- 1. Simple
- 2. Visible to team
- 3. Displays lead & lag measures
- 4. Winners are obvious

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Create a Compelling Scorecard





Advocate Motivation

- Don't overwhelm
- Allow ownership
- Provide self-selection of tactics (Momentum of minor victories)
- Increase responsibility in stages
- Acknowledge achievements

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Provide Self-Selection of Tactics



sat with 3 Presidents- @cardio10s @DickKovacs & Pres Abe Lincoln at the Capitol! Had a great discussion

about oversight of Prior auths for tests&drugs for

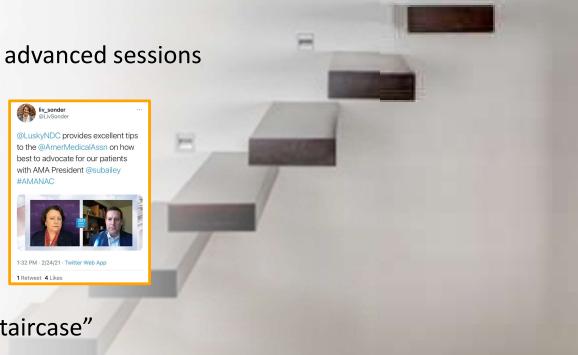
- Social media interaction
- Earned media (op-eds/LTEs)
- Virtual meetings
- In-district office meetings
- Hosted events
- Informal "Coffees with Congress"
- Community intercepts

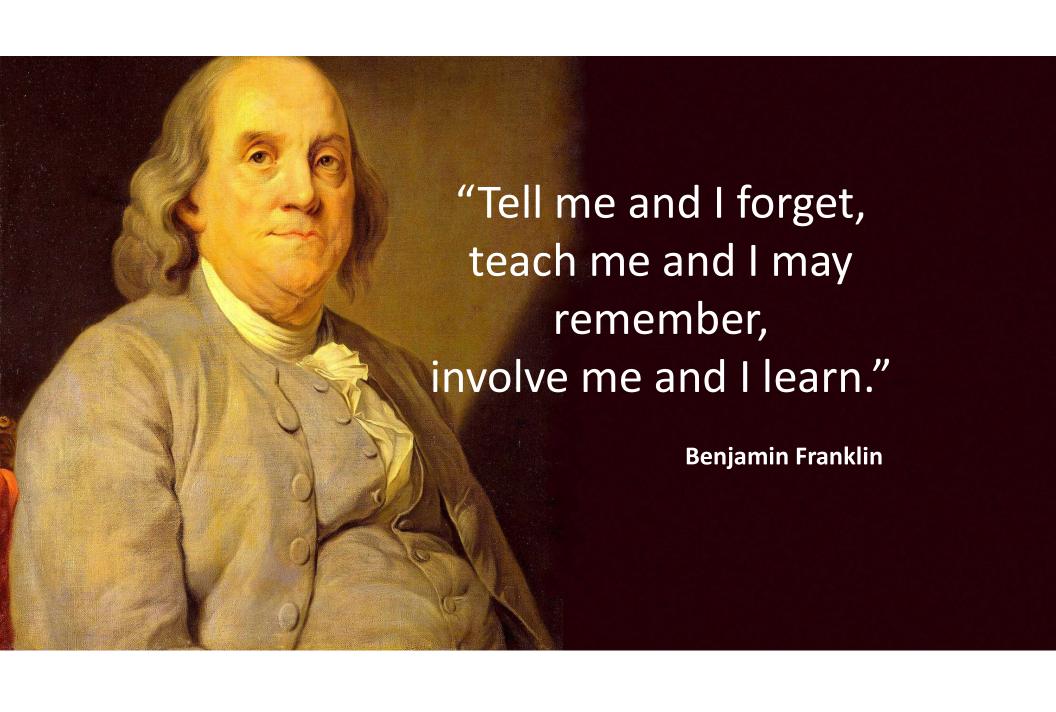






- Distinct introductory, intermediate & advanced sessions
- Paralysis via information overload
- Monthly or quarterly cadence
- Combine online & in-person
- Advance up "advocacy involvement staircase"





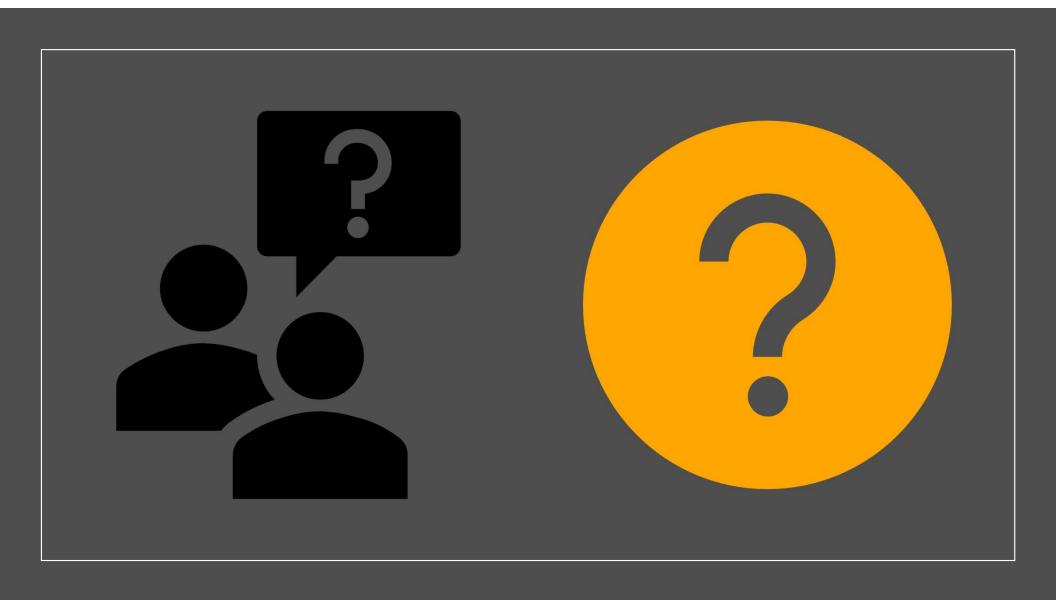






Training Grasstops & Ambassadors

- Interactive
- Collaborative
- Message framing exercises*
- 3 types of lawmakers*



7 Tips for Building Strategic Grasstops & Ambassadors Program

Lindsay Torrico, Senior Director of Policy and Advocacy, United Way Worldwide





The State of Play

- Time of uncertainty and immediate suffering
- Millions in lockdown
- People were looking for ways to support their communities in meaningful ways
- Shift from offline to online





1. Be responsive and adjust to meet the moment



2. Clarify policy goals, priorities and asks





Fight for America's Recovery

- 1. Expand universal charitable giving incentives
- 2. Expand the Earned Income Tax Credit (EITC) and Child Tax Credit (CTC) for working individuals and families
- 3. Increase funding for Medicaid
- 4. Provide supplemental **emergency funding** for programs that support the financial stability of families and communities like **211**, **Emergency Food and Shelter Program, Volunteer Income Tax Assistance program**, and stabilizing the **child care system**
- 5. Increase monthly Supplemental Nutrition Assistance Program (SNAP) benefits
- 6. Investment more in Enhanced Unemployment Insurance and Economic Impact Payments



3. Create year-round engagement opportunities





FAR Campaign Calls to Action







4. Segment grasstops leaders



UNITED WE FIGHT. UNITED WE WIN.

LIVE UNITED

Targeted Engagement & Communications









The Honorable Nancy Pelosi Speaker U.S House of Representatives Washington, DC 20510

The Honorable Kevin McCarthy Minority Leader U.S Senate Washington, DC 20510

July 20, 2020

Dear Member of Congress,

On behalf of the network of agencies and partners that provide 211 services across the United States, we request an emergency appropriation of \$150 million to build 211's capacity to respond to millions of calls from Americans in need of health and financial assistance and support during and long after the COVID-19 pandemic



The Honorable Mitch McConnell Majority Leader Washington, DC 20515

The Honorable Charles E. Schumer Minority Leader U.S. Senate Washington, DC 20510





Hi Lindsay,

Thank you for speaking up to support individuals and communities struggling to get by during this pandemic. Nearly a year later, the challenges remain large, but Congress has taken action to provide much-needed relief. That is good news for our country and the communities we serve.

We all need to celebrate the wins when we can.

There are a lot of investments and supports in the recently passed bill that we celebrate, but here are our top seven wins:



5. Mobilize and drive towards a collective activation point





Virtual Advocacy Training & Hill Day



#relief4charities taking meeting match congress match families individuals 200 #expandeitc advocate join #covid 19 thank talk members #uwadvocate charitable nonprofits learn deduction states united urge advocacy community package increasing working joining supports pandemic expanding #relief4charties meeting meeting families congress match families individuals individuals including including thank talk members policies needs policies needs pandemic expanding



6. Celebrate the small wins & keep the momentum



UNITED WE FIGHT. UNITED WE WIN. LIVE UNITED

Your Voice Was Heard!



We've secured critical nutrition supports including increases for WIC, Child Nutrition Programs, and a suspension of SNAP work requirements



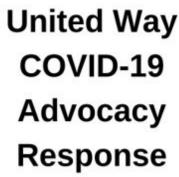
We increased investments in child care by \$3.5 billion and secured \$750 million for Head Start

Established a nonitemizer charitable deduction for up to \$300 for 2020





Our network has sent thousands of tweets calling for #Relief4Charities



Fighting for health, education, and financial stability during and beyond the COVID-19 crisis



Twice as many United Way advocates called or e-mailed Congress in the last three weeks of March compared to all of 2019



We ensured that nonprofits were eligible for critical business supports like SBA loans and removed the provision barring nonprofits receiving Medicaid funds from being eligible







We fought and won \$200 million for the Emergency Food and Shelter Program





Keeping Advocates Engaged





Hi Megar

As part of our COVID-19 response, United Way is bringing together thousends of advocates from across the United States to push for policies that provide critical relief to those most impacted by this pandemic. And, it's workling.

Together, we helped shape the \$2 trillion emergency relief package passed by Congress, which seeks to aid millions of Americans during this economic and health crisis.

This is welcome news for our country and the communities we serve. To learn why, read this blog post for six things you need to know about the COVID-19 relief bill.

Right now, it's more important than ever for people like you to speak out and to fight for solutions helping the most vulnerable among us.

Yours in service

Lindsay Torrico Senior Director of Policy and Advocacy United Way Worldwide

LEARN MORE





Hi Meghan Roberts,

As the coronavirus continues to impact the country, Black communities continue to be hit harder and feel the worst of the economic and health crisis. That's why your voice is needed today.

Right now, Congress is negotiating another coronavirus relief package. As we approach the end of July, action is needed now to extend existing policies and expand programs that support individuals and families—like enhanced unemployment insurance, increased monthly SNAP benefits and additional Medicaid funding for states.

We're asking Congress to include support to help feed those facing food insecurity, connect those in financial distress with resources to make ends meet, increase charitable giving to nonprofits and provide childcare to parents that are getting back to work.

Email Congress <u>now</u> to fight for policies that help communities recover from the devastation caused by the pandemic.

Our families and communities can't wait.

TAKE ACTION

Sarah

milies are continuing to struggle with the COVID-19 pandemic and the resulting onomic impacts. Congress is negotiating another relief package and they need to ar from you that communities can't continue to wait.

nce COVID-19, there has been a spike in families experiencing food insecurity and million children are still not getting enough to eat.

milies shouldn't have to choose between paying their bills or feeding their kids. at's why we're calling on Congress to increase monthly SNAP benefits by 15%, at would provide a family of four with an extra \$100 per month to put food on the

Falso a good deal for America's economy. For every SNAP dollar a family receives, by spend \$1.50, helping to infuse dollars locally and jumpstart our economy.

day, August 10, is a National Day of Action to #BoostSNAPNow. Add your voice.

Click to tweet and urge Congress to #BoostSNAPNow

milies across the country are doing their part to stay healthy and keep their mmunities safe. It's time now for Congress to step up so that families can meet their sic needs and have enough to eat.

ill you join us? Tweet now.





7. Track success and tell your story





Our Results

- A 265% increase in individual advocates engaged
 - 3,350 advocates sent 11,500 emails and made 400 phone calls
- 2X as many advocates emailed or called Congress in last three weeks of March than all of 2019
- 450 United Way CEOs signed onto letter to Congress
- 250 participants in Virtual Hill Day in June 2020





Final Reflections

- Start with policy and engagement goals
- Create an advocate journey
- Cross-functional collaboration with communications, customer engagement, donor relations, email marketing teams
- Integrate a donation ask (convert advocates to donors)
- Lead them to the next step



Thank You!



Case Study:
Leveraging
Grasstops in a
Virtual
Environment

March 23, 2021



RESOLVE's Mission

RESOLVE is dedicated to ensuring that all people challenged in their family building journey reach resolution through being empowered by knowledge, supported by community, united by advocacy, and inspired to act.

RESOLVE exists to provide:



Access to Care



Access to Education



Advocacy for Coverage



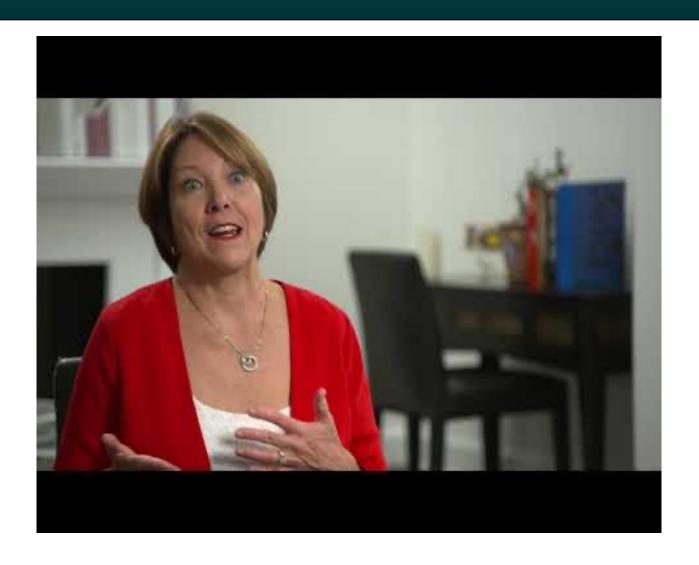
Awareness of All Family Building Options



Access to Support & Community



Short Introductory Video



RESOLVE's Advocacy Program & Virtual Federal Advocacy

RESOLVE Advocacy Network (RAN):

- New branded advocacy program as of 2020, which includes all state and federal advocates; access to action alerts, toolkits, and private Facebook Page for community and mentoring
- 2,000+ grassroots advocates representing all 50 states
- 100+ advocates in leadership/mentor positions

Federal Advocacy Day:

- RESOLVE hosts an annual Federal Advocacy Day in partnership with ASRM to discuss top priorities on the Hill in May/June
- In person: 200 advocates from 30 states
- Pivoted to virtual in 2020, to engage 385+ advocates from all 50 states in 262 Congressional meetings





Case Study: RESOLVE's Virtual Federal Advocacy

Advocacy Day Goals for Advocates (Virtual):

- Increased awareness, education, and support for our issues from Congressional Offices.
- Uniformed training for advocates and leaders to be prepared for their meetings.
- Builling a sense of community and engagementespecially in a virtual environment.

Volunteer Leadership & Interest:

- We need volunteer leadership support to achieve our goals and mission!
- Set up an application process and required informational webinar to streamline volunteers.
- Results: 90+ final applications
- Recruitment:
 - o Emails
 - Social media
 - Surveys and registration







Virtual Federal Advocacy Day Committee

Uniform training and onboarding process for volunteer leaders:

- Tiered levels of Volunteer Leadership, Mentorship, and Engagement
- Volunteer Manual
- Volunteer Contract
- Private Facebook Group & Google Docs System
- Ability to connect with mentors



Volunteer Committee Leadership Roles

- "Train the Trainer" model
- Structure: 2 Co-Chairs direct full committee, leads for 6 subcommittees, 3 outside mentors, and 60+ volunteers
- 2-year commitment for leads/co-chairs, 3year term for regular advocates- transition to mentor roles
- Bi-weekly full group phone calls with updates, weekly calls with subcommittee specialized groups
- Shared drive documents
- Review process, deadlines and timelines



Volunteer Committee Leadership Roles

- Who are the volunteers and mentors?
 - Patients, healthcare professionals, friends and family, individual and corporate supporters, non-profit professionals from all 50 states with various skillsets
- Volunteers responsible for supporting:
 - Recruitment
 - Engagement/Social Meetups and Connection
 - Letter Campaign
 - State Captain Program
 - Social Media
 - Follow Up
 - Other (Mentors/Video Library)



Co-Chairs, Letters, and Follow Up Leaders

Co-Chairs

- Provide support for overall strategy and vision of theme for Advocacy Day "Represent," "Let's Talk", and structure of committee
- Liaison between RESOLVE, ASRM, and full committee members
- Organize leads, bi-weekly calls, makes sure deadlines and tasks are met
- Troubleshoot problems and brainstorms solutions

Letter Campaign

- Assists in writing language for complementary letter sent by advocates to Members of Congress (almost 6,000 last year)
- Helps to amplify message through targeted recruitment and communications

Follow Up

- Sent personalized letters to all attendees before and after event
- Created thank you template
- Designed August Recess and follow up Campaign
- Advocacy Scorecard

Recruitment, Engagement, and Mentor Leaders

Recruitment

- Research and Connected with 250+ allied organizations, high touch outreach to amplify our message
- Social Media, letters, phone calls, and email campaigns
- Peer to peer engagement

Engagement

- Created first time advocate toolkit
- Designed Social Meet Up Happy Hours: Hosts, Breakout Rooms, Drinks
- Mentors for new advocates-could reach out to them to schedule one on one personalized calls

Additional Mentors

- For those who hit term limits, can transition to Mentor/supervisory role
- Can be paired with new committee member to set up individualized calls and offer support
- Also, option to move to RAN mentor role

State Captain Leaders

Who are they?

State Captains are experienced and dedicated volunteers who provide invaluable leadership and advocacy expertise to advocates in their state for RESOLVE/ASRM's annual Federal Advocacy Day. 60+ Volunteer Leaders in this role, with larger states with Co-Captain Model.

Main Responsibilities:

- Organize meetings, practice mock sessions
- Do research on Members of Congress
- Assist advocates with talking points and telling their stories
- Help group feel comfortable with technology
- Assist with Follow Up

Resources: State Captain Toolkit, Training Webinars, Scripts and Documents

Video Library Project

<u>Purpose</u>: 60% of our registrants for Advocacy Day were first time attendees, so we needed to utilize our Grasstops volunteers to assist in training, developed Video Library Project.

We asked mentors and experienced advocates to record their stories as they shared with members of Congress, to provide examples to new advocates We collected from variety of backgrounds to be inclusive of many different stories in Family Building Community. We also created a template to assist.

Example Story: https://resolve.org/get-involved/events/advocacy-day-video-library/

Resources for Advocacy Day

- Givbee Text System
- Phone2Action (Letter System)
- Training Website
- Develop Digital Materials to Promote Event
- Formalized Training for Advocacy Day- short video clips and live session
- REMO Platform
- Zoom Happy Hour Meetings
- Social Media: Twitter Storm, Selfie Signs, and specialized Zoom backgrounds





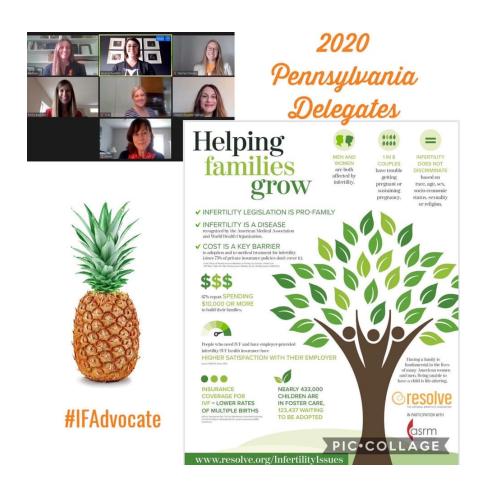
Results, Feedback, Follow Up

With the help of 100+ advocate leaders we were able to:

- Recruit 385 people to join Advocacy Day who attended 262 Congressional Meetings
- Engage with over 100+ allied organizations
- Host Training sessions with 150+ attendees
- Have social met-ups and happy hours with 200+ in attendance
- Nearly 6,000 letters sent to offices
- Post AD anonymous survey with 100+ responses and 100% of advocates said they would return

Follow-Up with Volunteer Committee Leaders:

 Provided group with opportunity for debrief group calls, anonymous survey, and individualized



Lessons Learned

- 1. Utilize your experienced advocates- they want to help, and they can greatly amplify existing efforts
- 2. Provide clear communication on expectations, vision, timelines, tasks, roles and directives for volunteers (contract/understanding of scope)
- 3. Understanding, compassion, and flexibility for advocates and mentors (mistakes will happen, there will be attrition rates, and people have life challenges they are going through)
- 4. Provide room and space for new ideas from mentors on programming and feedbackallow them opportunity to share
- 5. Recognize and thank your advocates for their hard work

Questions?



- Thank you for participating!
- Contact <u>tsullivan@resolve.org</u> with any questions!