

# Advocacy for Boards of Human Services Organizations

## Helpful Hints



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### **Helpful hints**

#### **1. What is advocacy?**

Advocacy has a variety of definitions, including:

- An effort to shape public perception or to effect change that may or may not require legislation (Habitat for Humanity and Canadian CED Network (HH and CED Network, no date, p. 5);
- Any attempt to influence the decision of any institutional elite on behalf of a collective interest (Jenkins, 1987, p. 297)
- The act of speaking or of disseminating information intended to influence individual behavior or opinion, corporate conduct, or public policy and law (Rektor, 2002. p. 1)

#### **2. What is lobbying?**

There are a number of definitions for lobbying, including:

- Communication directly with a policy decision-maker to express an opinion about *specific or proposed legislation* [author's italics]. Grassroots lobbying involves communicating the agency's opinion about specific or proposed legislation to the general public, including *a call to action* [author's italics] (Donaldson, 2010, p. 45)
- Communication by an individual who is being paid to communicate with government through a public office holder about laws, public policy, programs and possibly about obtaining a grant or contract (Berezan, 2009, p. 1)
- A small aspect of advocacy that involves a decision and follow up action taken by a board to change public policy (Berezan, 2009, p.1)

#### **3. Why is advocacy important for human service organizations?**

- The work of human services organizations is strongly influenced by government policy and regulations. Working to ensure these policies and regulations are in line with organizational service priorities and preferences is important to ensure organizational sustainability and survival (Hasenfeld, 1992, no page number).
- In era of privatization and increased competition for limited public funding, many organizations see it as being vital they advocate for maintaining or expanding the services they provide (Marwell, 2007, no page number).
- Advocacy can greatly benefit the well being of clients. By calling attention to problems affecting communities and the populations they serve, human service organizations promote greater equality in a democratic system and further their mission.
- Because of their numbers and important roles, human services organizations have the potential to be an influential voice in social policy.
- Human service organizations are advocating on behalf of the most disadvantaged members of society (Mosley, 2011, p. 36).

#### **4. What critical roles do boards of human services organizations play in advocacy?**

Boards of human services organizations play the following critical roles in advocacy:

- Board members are a vital resource to gain access to policy makers and funders due to their position and stature as community members. (Berezan, 2009, p.2).
- The role of the board to champion the mission corresponds with the role and responsibilities it takes on as advocates for both the organization as a whole, as well as its services and programs (Volunteer Canada, 2003. p. 5).

#### **5. What are the major steps in developing a board advocacy strategy?**

The major steps in developing a board advocacy strategy are:

- Identify the issue. This is best done with the organization's stakeholders to ensure the board understands the issue.
- Research. It is vital to get the facts to in order to fully understand all aspects of the issue as well as the potential organizational and public support available to advocate for change.
- Strategize. Create short, medium and long-term goals, select timeframes, and determine how the issue and the advocacy effort for change will be communicated and to whom it will be communicated.
- Implement. Develop a formal advocacy initiative, mobilize support, inform your stakeholders and gain commitment for your initiative, moving from idea to action.
- Organize. Communicate clearly with your stakeholders about the issue and your advocacy initiative.
- Educate. Utilize your advocacy initiative to reach out to new people and gain their support.
- Evaluate. Review the impact of your advocacy initiative during its implementation and after it is concluded. Consider what has been done well and what could be improved on. (Adapted from Volunteer Canada, 2003, p. 17 – 18).

#### **6. What types of advocacy tactics are commonly used by human service organizations?**

There are two types of advocacy tactics: insider and indirect. These are defined as follows:

- Insider tactics are those intended to change policy or regulation by working directly with policy makers and other institutional elites. These can include: participating in government commissions or committees by providing testimony or a presentation, and meeting with elected officials. (Mosley, 2011, p. 439)
- Indirect tactics are a wide range of different activities that generally do not require the type of inside connections as insider tactics. These can include: providing public education, writing letters to the editor, working with advocacy coalitions, issuing policy reports, and conducting a demonstration or a boycott. (Mosley, 2011, p. 440).

## Insider Advocacy Tactics

### 7. What do board members need to know when preparing briefs or position papers to present to government commissions or committees?

It is important for boards to know the following when preparing briefs or position papers for presentation:

- A brief or position paper is a paper that outlines an issue or situation, analyses the failings or shortcomings involved, and offers solutions. Since it is intended to inform and persuade, a brief should be factual, straightforward and unemotional. Briefs are usually written for audiences whose time is at a premium, so they should be short and to the point. Statistics, costs or other relevant figures can be attached in appendices.
- All levels of government sometimes create task forces, commissions or committees to study issues and hear from experts, citizens' groups and individuals before legislation is drafted or final decisions made. When briefs or position papers are used to present material to a task force, government department or commission they are often called submissions, and are usually read aloud by the presenter. (Community Services Consulting Ltd, no date, *Advocacy Handout*, p. 9)

### 8. What types of misinformed questions about nonprofit human service organizations might be raised by Alberta government Members of the Legislature (MLAs)?

Much work has been done to educate Alberta government MLAs about the charitable, nonprofit sector by a variety of Alberta member-based, nonprofit umbrella organizations such as the Alberta Association of Services to Children and Families, the Edmonton and Calgary Chambers of Voluntary Organizations, and Volunteer Alberta. However, there are MLAs with misperceptions or inaccurate information about the charitable human services sector. As a result, an MLA may ask you the following general questions:

- Why are there so many human service agencies?
- Given the sheer number of human service agencies, aren't there duplications in programs and services?
- Why do many human service agencies complain of funding shortfalls but wind up with annual operating surpluses?
- If funding is an issue, why don't human service agencies undertake community fund raising efforts?
- Why do non-profit organizations need more funding? (AASCF, 2011, *AASCF Advocacy Strategies- Agency Board Engagement*, p. 2).

**9. What can a board do to respond effectively to misinformed questions that Alberta Members of the Legislature (MLAs) might raise about the nonprofit human services sector?**

Be prepared for the types of misinformed questions that Alberta government Members of the Legislature (MLAs) might ask about the Alberta nonprofit human service sector by doing the following:

- Learn about the views of the MLA you will be meeting with by reading “Hansard” or searching the Internet for news stories in which the MLA is featured.
- Visit the websites of various Alberta umbrella organizations to identify potential questions that might be raised by an MLA in a meeting.
- Collect statistical information ready to respond to an MLA’s potential general questions. Respond briefly and factually. Do not argue with the MLA.
- If it seems appropriate, follow up later with the MLA by providing documents from Alberta umbrella organizations that offer factual information about the Alberta nonprofit human services sector.

**Indirect Advocacy Tactics**

**10. What are some ways of informing stakeholders about your advocacy initiative?**

There are a variety of ways to bring your advocacy initiative forward to educate a variety of stakeholders, including:

- Events such as information sessions, panel discussions or workshops.
- Publications including brochures and newspapers
- Use of media including print, television, radio, and the Internet. (Adapted from Volunteer Canada, 2003, p. 34; Caledon Institute of Social Policy, 2011, p. 12).

**11. How can a board’s advocacy efforts be sustained over time?**

The following options are suggested for boards to sustain their advocacy efforts over time

- Create a Board public policy to enhance and support the advocacy functions of the organization
- Strike a Board Advocacy Committee
- Dedicate funding resources earmarked specifically for organizational advocacy purposes.
- Participate actively in coalition and umbrella organizations.
- Look at a variety of ways to connect elected officials with your agency. This can include inviting them to speak at annual meetings or breakfasts/luncheons, involving them in special events such as annual general meetings, and putting them on mailing lists. (Donaldson, 2008, p. 35-36; HH and CED Network, no date, p. 17)

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