Essential Steps in Effective Advocacy Strategies

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Today’s Agenda

• Why advocacy?
• Review steps in effective advocacy strategies
• Build skills in development of written advocacy tools:
  – One-pager (as part of leave-behind materials)
Overall Principles

• Success is dependent on both *substance* and *relationships*
• Please, please be gracious
• First impressions matter
• Rational v. emotional
• Congenial v. adversarial
Overall Principles

- Process expertise
- Broad application
- Etiquette and protocol
- No gum, hair twirling, nail picking...
- Please, turn off and store your phone
- It’s not rocket science!
A Benefit-Based Copay for Prescription Drugs: Patient Contribution Based on Total Benefits, Not Drug Acquisition Cost

A. Mark Fendrick, MD; Dean G. Smith, PhD; Michael E. Chernew, PhD; and Sonali N. Shah, MBA, MPH
EDITORIAL

Value-Based Insurance Design:
A “Clinically Sensitive” Approach to
Preserve Quality of Care and Contain Costs

A. Mark Fendrick, MD; and Michael E. Chernew, PhD
Evidence That Value-Based Insurance Can Be Effective

ABSTRACT Value-based insurance design reduces patient copayments to encourage the use of health care services of high clinical value. As employers face constant pressure to control health care costs, this type of coverage has received much attention as a cost-savings device. This paper’s examination of one value-based insurance design program found that the program led to reduced use of nondrug health care services, offsetting the costs associated with additional use of drugs encouraged by the program. The findings suggest that value-based insurance design programs do not increase total systemwide medical spending.
To establish a demonstration program requiring the utilization of Value-Based Insurance Design in order to demonstrate that reducing the copayments or coinsurance charged Medicare beneficiaries for selected medications can increase adherence to prescribed medication, and for other purposes.

IN THE SENATE OF THE UNITED STATES

MAY 14, 2009

Mrs. Hutchison (for herself and Ms. Stabenow) introduced the following bill; which was read twice and referred to the Committee on Finance

A BILL

To establish a demonstration program requiring the utilization of Value-Based Insurance Design in order to demonstrate that reducing the copayments or coinsurance charged Medicare beneficiaries for selected medications can increase adherence to prescribed medication, and for other purposes.

1 Be it enacted by the Senate and House of Representa-
2 tives of the United States of America in Congress assembled,
3 SECTION 1. SHORT TITLE.
4 This Act may be cited as the "Seniors' Medication
5 Copayment Reduction Act of 2009".
S.1040 – Senators Hutchison (R-TX) and Stabenow (D-MI)

May 2009

• Seniors' Medication Copayment Reduction Act of 2009
  – Directs the Secretary of Health and Human Services to establish a demonstration program to test Value-Based Insurance Design methodologies for Medicare beneficiaries with chronic conditions
H. R. 3590

One Hundred Eleventh Congress of the United States of America

AT THE SECOND SESSION

Began and held at the City of Washington on Tuesday, the fifth day of January, two thousand and ten

An Act

Entitled The Patient Protection and Affordable Care Act.

Be it enacted by the Senate and House of Representatives of the United States of America in Congress assembled,

SECTION 1. SHORT TITLE; TABLE OF CONTENTS.

(a) Short Title.—This Act may be cited as the “Patient Protection and Affordable Care Act”.

(b) Table of Contents.—The table of contents of this Act is as follows:

Sec. 1. Short title; table of contents.

TITLE I—QUALITY, AFFORDABLE HEALTH CARE FOR ALL AMERICANS

Subtitle A—Immediate Improvements in Health Care Coverage for All Americans

Sec. 1001. Amendments to the Public Health Service Act.

“PART A—INDIVIDUAL AND GROUP MARKET REFORMS

“SUBPART II—IMPROVING COVERAGE

“Sec. 2711. No lifetime or annual limits.

“Sec. 2712. Prohibition on rescissions.

“Sec. 2713. Coverage of preventive health services.

“Sec. 2714. Extension of dependent coverage.

“Sec. 2715. Development and utilization of uniform explanation of coverage documents and standardized definitions.

“Sec. 2716. Prohibition of discrimination based on salary.

“Sec. 2717. Ensuring the quality of care.

“Sec. 2718. Bringing down the cost of health care coverage.

“Sec. 2719. Appeals process.

Sec. 1002. Health insurance consumer information.

Sec. 1003. Ensuring that consumers get value for their dollars.

Sec. 1004. Effective dates.

Subtitle B—Immediate Actions to Preserve and Expand Coverage

Sec. 1101. Immediate access to insurance for uninsured individuals with a pre-existing condition.

Sec. 1102. Reinsurance for early retirees.

Sec. 1103. Immediate information that allows consumers to identify affordable coverage options.

Sec. 1104. Administrative simplification.

Sec. 1105. Effective date.

Subtitle C—Quality Health Insurance Coverage for All Americans

PART I—HEALTH INSURANCE MARKET REFORMS

Sec. 1201. Amendment to the Public Health Service Act.

“SUBPART I—GENERAL REFORM

“Sec. 2704. Prohibition of preexisting condition exclusions or other discrimination based on health status.

“Sec. 2701. Fair health insurance premiums.

“Sec. 2702. Guaranteed availability of coverage.

“Sec. 2703. Early enrollment in Medicare.

“Sec. 2705. discouraged the use of Guardrails.
“2713(c) Valued-based Insurance Design. –The Secretary may develop guidelines to permit a group health plan and a health insurance issuer offering group or individual health insurance coverage to utilize value-based insurance designs.”
“The Departments recognize the important role that value-based insurance design can play in promoting the use of appropriate preventive services.”
“Value-based insurance designs include the provision of information and incentives for consumers that promote access to and use of higher value providers, treatments, and services.”
Step #1: Identify Your Issue

- What is the problem?
- Do your research: be the expert and serve as a resource
- Understand all sides of the issue, and all arguments, pro and con
Step #2: Define and Clarify Goal

- What do you want the policymaker/decisionmaker to do?
- Do not describe the problem without presenting a viable solution
- SMART goal: specific, measurable, assignable, realistic, time-related
Step #2: Define and Clarify Goal

- Include short, intermediate, and long-term goals (patience)
- Include acceptable alternatives and compromises
- Understand political context, realities, and limitations
Step #2: Define and Clarify Goal

- Using research findings and substantive policy analysis, develop the “ask”
  - Proactive or reactive?
  - Take action, or protect/maintain the status quo?
  - Change current law or create a new law?
  - Can your goal be accomplished by executive order, or regulation?
  - OR are you educating policymakers for future action?
Step #2: World Peace?

• Be as clear as possible about what you are asking the policymaker/decisionmaker to do

• If appropriate, include the specific legislation/vehicle that addresses the issue, the lead sponsor, and the timing of future actions
I’m writing to urge you to support an amendment offered by Michigan Senators Stabenow and Peters to S. 2012, the Energy Policy and Modernization Act. This amendment would provide up to $400 million to the U.S. Environmental Protection Agency to help repair the water supply infrastructure in Flint, Michigan and protect its children from dangerous lead contamination.”
Step #3: Know Your Audience

- Who can accomplish your goal?
- Identify decisionmaker: often not intuitive (legislation: not the White House!)
- Authorization (policy) v. appropriation ($$$
- Elected official v. staff (be aware of term limits in Michigan!)
Step #3: Know Your Audience

• Who influences the decisionmaker?
  – Media
  – Constituents
  – Interest groups/stakeholder organizations
IT'S TOO EASY TO BUY A GUN IN AMERICA

EACH DAY 89 PEOPLE ARE KILLED

BY GUNS

CONGRESS,

STAND UP TO THE NRA &

PASS SANE GUN LAWS NOW!!!
Step #4: Learn the Process

• What is the relevant process for accomplishing your goal?
  – Legislative? Executive order? Regulatory?
• Understand each step and opportunities for influence
• Be aware of timing
• Learn the etiquette and protocol
Step #5: Find Your Allies

- Who can help you accomplish your goal?
- Identify and cultivate a champion
  - Internal advocate who shares your commitment to accomplishing your goal
  - Mole! Source of intelligence and information throughout the process
  - Possible examples: constituent elected officials, committee jurisdiction, state delegations, governors, leadership, caucuses
Step #5: Find Your Allies

- Identify stakeholder organizations: what are they doing that is relevant to your goal?
- Who shares your passion for accomplishing your goal?
- Forge coalition to unite around a common goal
- Include grassroots efforts to build out constituent engagement
Step #6: Develop Your Message

• What will resonate with your decisionmaker?
• (Is it about money?)
• Tailor messages to specific audiences
• Prepare talking points
• Address and refute opposing arguments in your pitch (using research/expertise)
• Factor in both substantive and political context
Step #7: Advance Your Message

- Identify opportunities to communicate your message to the decisionmaker
  - Cultivate personal relationships
  - Conduct in-person, face-to-face meetings
  - Provide testimony in public hearings
  - Hold briefings on your issue
  - Participate in elected officials’ “town hall” meetings
  - Invite decisionmaker/policymaker to come to you – visit project site, attend event, etc.
Step #7: Advance Your Message

- Identify opportunities to communicate your message to the decisionmaker
  - Mail – letters, the old fashioned way!
  - Email (reality of post 9-11 security)
  - Grassroots efforts that engage constituents
  - Media: strategic placement of op/eds
  - Social media (Facebook, Twitter)
  - Blogs
  - Participate in campaign activities
Step #8: Prepare Written Materials

- Develop variety of written advocacy materials to share widely with decisionmakers/stakeholders
- Prepare “leave behind” packet of information
  - Write concise “one-pager” advocating for your goal
  - Include supporting white papers, press, policy briefs, FAQs, fact sheets, academic articles, other relevant and compelling information
- Tailor messages to specific audiences
Step #9: Advocate! Execute Strategy

- Map out and execute your strategy
- Be brief, concise, and clear (8 minute rule)
- Network and build relationships (using informational interviewing approach)
Step #9: Advocate! Execute Strategy

- Practice integrity, honesty, and respect
- Be responsive to requests for additional information, answer questions, etc.
- Be considerate of competing demands/time issues for decisionmakers
Step #9: Advocate! Execute Strategy

- Guide to advocacy communications (written and oral)
- Employ the 8 minute rule!
  - “Thank you for taking the time to meet/talk with me today.”
  - Introduce yourself, the organization or cause you represent, and identify the reason for your visit (for example, specific legislation, upcoming vote, etc.)
  - Explain why this is relevant to them and why they should care (local constituent issue, they are a member of a committee with an upcoming vote, etc.)
  - Provide information, and address opposing points of view to arm them with answers to arguments and questions they may receive
  - Offer to serve as a resource and provide follow-up information
  - “Thank you for taking the time to meet/talk with me today. Please let me know how I may be helpful to you or your colleagues. It would be a pleasure.”
Step #10: Followup

- Write thank you notes! Order personal stationery!
- For Capitol Hill correspondence, use email (post 9-11)
- Offer assistance, serve as a resource, answer questions, provide new information
- Maintain contact and stay in touch to strengthen relationships
Steps in Effective Advocacy Checklist

• #1: Identify your issue: What’s the problem?
• #2: Define and clarify your goal: What do you want the policymaker to do to solve the problem?
• #3: Know your audience: Who has the authority to accomplish your goal?
• #4: Learn the process: What are the opportunities to accomplish your goal?
• #5: Find your allies: Who shares your goal, and who can help you accomplish your goal? Identify Champion and Build Coalition!
• #6: Develop your message: What argument will resonate with your decisionmaker?
• #7: Advance your message: What are the opportunities to interact and communicate with your decisionmaker?
• #8: Prepare written materials: What written resources will be helpful to your decisionmaker?
• #9: Advocate! Execute your strategy through written and oral communication
• #10: Follow up to maintain contact and build the relationship
One Pager

• The most important advocacy tool

• Routinely used to persuade a policymaker, or a decisionmaker in your organization, to take a particular course of action

• Use this in “leave behind” materials with policymakers/decisionmakers
One Pager

• Headings and sections to organize key points

• Bold/caps/underline for emphasis

• Lots of white space, bullet points

• Graphs and charts can be helpful
• No long citations (According to the CDC…)

• Use common terms, spell out acronyms, define terms if necessary (for the lay reader)

• Keep it simple

• Intended to be a VERY quick read
One Pager

• TITLE. State who you are/represent and the policy recommendation/goal you are seeking (the ask)

• PROBLEM. First heading: provide background/overview on the issue to create context, describing the problem you are trying to address. Use statistics/examples to create a compelling sense of urgency to motivate the policymaker/decisionmaker to take the action you recommend.

• SOLUTION. Second heading: describe the impact the action you recommend will have on the problem. Include statistics/examples to illustrate why this is the best solution.
In conclusion…

Questions, ideas or feedback?

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