

## Health Center Advocacy Work Plan SAMPLE

*This template is meant to guide your organization's advocacy work and priorities.*

- You do not need to include all items listed. Craft a plan for your unique setting.
- Include timelines of when you hope to complete each activity to keep your plan on track.
- You may also choose to add other items, such as achieving [Advocacy Center of Excellence](#) status, participating in the [Advocacy Leadership Program](#), attending NACHC [conferences](#), and/or advancing state and local policy initiatives.
- Find helpful [resources and templates here](#).

- I. **Make Advocacy Organizational Priority – Overarching Goal:** Make advocacy a known organizational priority by creating a culture of advocacy among board and staff and building advocacy into health center operations.
  - a. **Board Resolution:** Pass a board resolution with express commitment to making advocacy an organizational priority, including goals for education, engagement, and outcomes.
  - b. **Strategic Plan:** Incorporate advocacy goals into the organization's strategic plan.
  - c. **Advocacy Committee:** Create a standing advocacy committee, comprised of board and/or staff members tasked with driving advocacy initiatives across the organization.
    - i. Establish a committee charter, with clearly defined goals and expectations for members.
    - ii. Set a schedule for recurring committee meetings.
  - d. **HR Policies:** Establish directives for HR policies related to advocacy participation and initiatives at the organization. This includes the option for all staff to become health center advocates, either by self-selection, or auto-enrollment with the opportunity to opt out at any time.
    - i. **Onboarding new/existing staff:**
      1. Create HR process/policy for incorporating advocacy into onboarding for new staff, including the option to sign up as a health center advocate.
      2. Leadership will communicate with staff how advocacy promotes and protects the health center mission, provide the option to sign up as a health center advocate, and outline any policies regarding advocacy participation.
    - ii. **Statement of non-partisanship:** Publicly post or otherwise issue an organizational statement of non-partisanship.
    - iii. **Social media policy:** Establish a clear organizational policy on social media use as it relates to advocacy being conducted at the health center.
    - iv. **Civic Engagement:** Establish an organizational policy outlining rules and expectations regarding engagement in political campaign activities as representatives of the health center vs. as private citizens.

- e. **Staff Responsibilities (CEO & Others):**
  - i. Under direction of the CEO, establish clear goals and expectations relative to making advocacy an organizational priority.
  - ii. Designate at least one staff person (other than the CEO) to serve as the organization's advocacy coordinator. This person(s) will take the lead on organizing and carrying out advocacy activities.
- II. **Operationalizing Advocacy – Overarching Goal:** Establish clear procedures, protocols, and expectations as part of agency operations so staff remain aware of advocacy as an ongoing priority and understand how advocacy fits into the health center's scope and core culture.
  - a. **Health Center Leaders Model the Way:** Leadership will model and endorse advocacy as an organizational priority in the following ways:
    - i. Enforcing advocacy as a standing agenda item for staff and board meetings.
    - ii. Allowing time and encouraging staff to take action when advocacy opportunities arise.
    - iii. Recognizing staff/board members that make significant contributions to advocacy programming.
    - iv. Publicly expressing their own commitment to advocacy.
  - b. **Staff Engagement:** Establish clear ways for staff to engage in health center advocacy:
    - i. Recruitment of advocates
    - ii. Importance of taking action, as well as the steps and rules to follow when doing so.
    - iii. Share advocacy tools/platforms (action alerts, social media, etc.)
  - c. **Provide Training Opportunities:** Establish regular opportunities for advocacy training, either by working with NACHC/PCA or enabling staff to become equipped as facilitators.
  - d. **Respond to Calls to Action:** Establish a plan for activating staff on to calls to action:
    - i. Notifications/communication from leadership
    - ii. Follow-up to ensure action has been taken
    - iii. Reporting back on response rates and outcomes
  - e. **Clear Goals & Expectations:** Establish goals for assessment of advocacy work, including but not limited to:
    - i. Response rates to action alerts (work with NACHC/PCA to track responses when able and/or designate staff lead to track activities)
    - ii. National Health Center Week (NHCW) events and participation
    - iii. Visits by elected officials
    - iv. Advocacy trainings
    - v. Media placements and/or measurable social media visibility
    - vi. Number of registered advocates
- III. **Engage the Community in Advocacy – Overarching Goal:** To increase awareness of the health center mission among stakeholders in advocacy initiatives, events, and specific actions that support the vital role the health center plays in the community.
  - a. **Patients:** Establish a plan and goals for how to educate and engage patients in advocacy initiatives:
    - i. Create education materials and set recruitment goals to build the health center advocacy network.

- b. **Partners/Influencers:** Establish a plan to support engagement by community partners/influencers in health center advocacy efforts:
    - i. Create a list of possible partners/influencers to approach as advocacy partners.
    - ii. Determine what specific actions or type of support you would like them to take as advocacy partners/influencers.
  - c. **Media:** Support engagement with media in health center advocacy efforts:
    - i. Create a list of media contacts.
    - ii. Identify a spokesperson(s) at the health center.
    - iii. Invite media to visit the health center and attend relevant events.
  - d. **Elected Officials:** Establish relationships with elected officials:
    - i. Create a list of elected officials representing health center district(s) and corresponding key contact relationships.
      - 1. This could include conducting a relationship inventory among board members, senior staff, providers, etc. (i.e. who knows who).
    - ii. Identify appropriate individual(s) at the health center to cultivate relationships with elected officials.
    - iii. Determine specific actions or type of support you would like from elected officials.
- IV. **National Health Center Week & Observances – Overarching Goal:** Leverage National Health Center Week (NHCW) and other events/observances to raise awareness and visibility about the success, effectiveness, and importance of the health center in the community.
- a. **Staffing:** Identify key staff, board members and volunteers who will lead efforts to coordinate NHCW activities.
  - b. **Plans & Resources:** Create a list of existing and needed resources to plan and execute successful events/activities.
    - i. Include timelines and roles/responsibilities to ensure plan is implemented effectively.
    - ii. Incorporate annual NHCW theme identified by NACHC.
  - c. **Goals & Expectations:** Establish clear goals and expectations to measure success of NHCW activities.
- V. **Reporting & Status Updates – Overarching Goal:** To ensure advocacy work and initiatives are appropriately tracked and reported to leadership, staff, and board members.
- a. **Benchmarking:** Set a timeline to evaluate progress, effectiveness and success, including specific goals for categories of advocacy work (i.e. advocate recruitment, media placement, identification of health center key contacts, visits with elected officials, etc.)
  - b. **Reporting:** Determine the frequency and point person(s) responsible for reporting progress and successes relative to advocacy work.
  - c. **Recognition/Celebration:** Establish a plan and resources needed to recognize key advocates, supporters, volunteers, etc.
    - i. Identify at least one opportunity annually (i.e. NHCW, annual meeting, etc.) to celebrate contributions and success in making advocacy an organizational priority.