Hello everyone. Welcome to the NAMI Smarts for Advocacy workshop, *Budgets: Funding Our Future*, part of NAMI’s grassroots advocacy series. My name is [name] and I will be facilitating your learning today. And helping us today is [name].

During this workshop, we’ll talk about how mental health funding plays an important role in paying for the services in your community. When funding is inadequate, services are inadequate, and people may go without the support they need to experience recovery.

We'll discuss how you can use the power of your story to influence the funding of mental health services. Elected officials pass the budgets that fund the mental health care that is available to you. As part of this workshop, we'll guide you through writing your story in seven short steps.

When you complete this workshop, our goal is that you take with you a version of your story that you can use to raise awareness, inspire others and influence policymakers.

We hope you’re excited. **Are you ready to start?** [Wait for a response, if appropriate] Great, we'll get started.

To begin, please take out your evaluation form and fill out the first column for question one and two only. You will fill out the rest of the evaluation form at the end of the workshop. [Give participants about half a min. to fill out the first two questions.]
<table>
<thead>
<tr>
<th>Slide 2</th>
<th>Approx. 1 min</th>
<th>Core Concepts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Agenda</strong></td>
<td><strong>Budgets: Funding Our Future is formatted to build on what research shows helps people learn:</strong></td>
<td></td>
</tr>
<tr>
<td>1. Learn why telling your story about funding for services is important</td>
<td>• First, you will <strong>learn</strong> why telling your story about funding for services is important</td>
<td></td>
</tr>
<tr>
<td>2. Hear tips for telling your story effectively</td>
<td>• Next, you’ll <strong>hear</strong> tips for telling your story effectively</td>
<td></td>
</tr>
<tr>
<td>3. Listen to an example</td>
<td>• <strong>Listen</strong> to an example</td>
<td></td>
</tr>
<tr>
<td>4. Discover what makes a story “work”</td>
<td>• <strong>Discover</strong> what makes a story work</td>
<td></td>
</tr>
<tr>
<td>5. Write your own story</td>
<td>• <strong>Write</strong> your own story and</td>
<td></td>
</tr>
<tr>
<td>6. Practice sharing your story</td>
<td>• <strong>Practice</strong> sharing it</td>
<td></td>
</tr>
<tr>
<td><strong>How does this sound to you?</strong></td>
<td><em>[Wait for group to respond.]</em></td>
<td></td>
</tr>
<tr>
<td>Again, today’s workshop is focused on using your story to help influence policymakers who will make budget decisions to support mental health services.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Slide 3</th>
<th>Approx. 1 min</th>
<th>Core Concepts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ground Rules</strong></td>
<td><strong>This workshop covers a lot of ground in a short amount of time.</strong> In order for everyone to get the most out of this session, I’d like to ask you to agree to the following basic ground rules:</td>
<td></td>
</tr>
<tr>
<td>To get the most out of our time together, please:</td>
<td>• Turn off your electronic devices unless absolutely necessary</td>
<td></td>
</tr>
<tr>
<td>◯ Turn off electronic devices</td>
<td>• Participate fully—be willing to do each of the activities and to stay focused</td>
<td></td>
</tr>
<tr>
<td>◯ Participate fully</td>
<td>• Because our time is limited, please keep questions and comments very brief</td>
<td></td>
</tr>
<tr>
<td>◯ Keep questions brief</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>To keep us on time, I’ll be signaling you when we need to stop an activity. I’ll let you know by [indicate how you’ll signal participants—voice, hand, chime, etc.] Please be willing to stop even if you are not finished.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If you have questions or comments that aren’t answered during the workshop, feel free to ask them when the workshop is over.</td>
<td></td>
</tr>
<tr>
<td><strong>Are you willing to follow these ground rules?</strong></td>
<td><em>[Wait for response]</em></td>
<td>Thank you!</td>
</tr>
</tbody>
</table>

**Prep:** Decide how you will signal participants during the workshop (e.g., by voice, raised hand, chime, etc.)
We’d like to say a word about why this workshop is part of NAMI Smarts for Advocacy. NAMI seeks to build better lives for all who are affected by mental illness or mental health conditions.

Access to mental health care in your community is critical to people’s ability to recover or manage their mental illness effectively. However, we know it can be difficult to find needed care.

Without appropriate funding for mental health, mental health services are harder to access.

Simply put, the amount of money in the budget for mental health affects the availability of mental health services and supports.

Because policymakers make decisions about mental health budgets, it is important to share how mental health services have affected you or someone you care about.

To start, let’s think about the role mental health services have played in your recovery or the life of someone you know. What did it take to get the right treatment? Have you experienced barriers in accessing needed care?

I’ll read three questions. If you’d like to share, raise your hand. Let’s try for a couple of responses to each question.

**Briefly, what mental health services helped you?** [Take 2 brief responses]

Policymakers like to fund things that work. Your examples of what has helped you are the perfect way to inspire policymakers by sharing how budget decisions can have a positive impact on the lives of people with mental health conditions.

**Briefly, what mental health services were missing when you needed them the most?** [Take 2 brief responses]
| Have you ever been told you were ineligible for a service you needed? | **Briefly, have you ever been told you were ineligible for a service you needed?** [Take 2 brief responses, then thank respondents for sharing]  
Examples of services that were missing or that people could not access help illustrate why budgets need to be strengthened to fill in gaps to allow more people to get the help they need.  
Thank you for sharing. Now we’re going to talk about what we mean by “mental health budgets.” |
|---|---|
| slide 6 | We want to start off by a statement of principal: NAMI believes that all budgets should fund the mental health services and supports that get people the help they need.  
Before we go further, we want to talk about the phrase “services and supports.” |
| Approx. 1 min | Core Concepts  
- Budgets should adequately fund mental health services and supports that get people the help they need |
### Core Concepts

#### Slide 7

**Approx. 2 min**

<table>
<thead>
<tr>
<th>Services &amp; supports mean the treatments, interventions and other supports that help people live successfully.</th>
</tr>
</thead>
</table>

When we talk about services and supports, we’re talking about the wide-range of treatments, interventions and other recovery supports that help people live successfully. This could include supportive housing, crisis response, stabilization, therapy, case management, peer support services, medications, and more. These services and supports fall into four categories:

- Outpatient Care, like therapy and case management;
- Inpatient Care, like long-term and short-term inpatient care;
- Crisis Care, like crisis response and stabilization; and
- Social Support, like supported housing.

So, when we say, “budgets should fund the mental health services and supports that get people the help they need,” we’re talking about funding the various types of services that improve the lives of people with mental health conditions.

#### Slide 8

**Approx. 1 min**

<table>
<thead>
<tr>
<th>Many different interests that compete for the same pot of money.</th>
</tr>
</thead>
</table>

While NAMI advocates for mental health funding, there are many different interests that compete for the same pot of money. Policymakers have to find a way to fund all aspects of government: mental health services, infrastructure, public education, law enforcement, pensions, among others.

If policymakers increase spending in one area, they have to cut in another area or increase revenue.

Policymakers must make tough choices to meet a wide range of community needs. Our job as advocates is to share how important mental health care is to the lives of about 1 in 5 people in our state who are affected by mental health conditions, their families and their communities.
It would be difficult enough if those were the only considerations policymakers had to think about.

**But, it gets more complicated...** [Pause for a moment]

---

We’ve mentioned before that policymaker decisions can disrupt communities’ budgets and what is available, but changes in the economy can impact budgets.

It’s predictable: the economy grows and shrinks. States know this, and most states have a “rainy day fund” for this very purpose. Why is this important? Because mental illness doesn’t go away in a down economy.
### Core Concepts

<table>
<thead>
<tr>
<th>slide 11</th>
<th>Approx. 1.5 min</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Core Concept</strong></td>
<td>When the economy gets worse, people lose their jobs and employer-sponsored health insurance. When people lose their jobs and insurance, more people use public services, like Medicaid, state unemployment benefits or the Supplemental Nutrition Assistance Program, also known as SNAP. The government also loses some of its tax revenue that pays for the programs in the budget. When more people use public services and there is less individual tax revenue, budgets are stretched thin and policymakers have to cut budgets, cut services and payments, use savings or collect new revenue.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>slide 12</th>
<th>Approx. 2 min</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Core Concept</strong></td>
<td>But, even under the best-case scenarios, funding is at risk during economic downturns. Mental health services are often the first to be cut and don’t deserve to be. <em>How many of you remember when this happened after the 2008 Great Recession? What was the effect on your community?</em> [Take 2 brief responses] That’s why your advocacy is so important. But to be most effective, it helps to understand funding streams and the budget process. This may seem confusing, but it doesn’t have to be.</td>
</tr>
</tbody>
</table>
The mental health services that you or your family member receive are funded at different levels of government.

Before getting into the state budget process, it could be helpful to cover some of the ways the federal government and local governments also fund mental health services.

When does the federal government pay for mental health services directly? There are a couple of notable cases: military and veterans’ mental health care and Medicare, not to be confused with Medicaid. Medicare is a 100% federal program that doesn’t just cover elderly Americans. It covers millions of people who have disabilities, including people with severe mental illness.

The federal government also provides funding to states, local governments, and non-profits. Here are some examples:

- **Department of Health and Human Services**, commonly referred to as HHS.
  - HHS provides roughly half the funding for Medicaid which covers many mental health services and supports and is one of the largest payers of mental health care in the country.
  - The Substance Abuse and Mental Health Services Administration (SAMHSA) Community Mental Health Block Grant is another notable source of funding that covers important services and supports that may not be covered by...
Medicaid, such as first episode psychosis programs and people who may be uninsured or underinsured.

- **Department of Justice**, or DOJ. DOJ provides grant funding for criminal justice-mental health initiatives, such as mental health courts and training for Crisis Intervention Teams (CIT).

- **Department of Housing and Urban Development**, or HUD. HUD provides funding for homelessness programs and affordable housing for people with mental illness.

NAMI at the national office fights hard for federal funding and you can help by signing up for advocacy alerts at nami.org/advocacy.

But a significant amount of funding happens at the state or local level, which is where you can have a major impact.

At the local level, some municipalities will fund mental health services through their own budget. For example, the county government may have a department of mental health that provides mental health services.

Funding can also come from foundations or grants, which often help communities provide more services. While this funding can be helpful, it is usually short-term and does not create a steady funding stream.

For the purpose of this training, though, we’re going to take a closer look at the state budget process.
At the state level, most mental health services are funded by the state Medicaid agency and the state mental health agency, which could go by different names in different states:

- Department of Mental Health
- Department of Behavioral Health
- Department of Health
- Department of Human Services
- Department of Health and Human Services

You can also find funding for mental health services in departments you wouldn’t necessarily consider, like housing and corrections.

You may be advocating for funding in more than one budget area.

The budget process is a cycle, and it’s important to understand it in order to know when to start your budget advocacy.

State budgets are passed every year or every other year. And the budget covers a set time period, or fiscal year. The fiscal year often isn’t a calendar year. For example, many states have a fiscal year that runs from July 1st to June 30th.

Use the Types of Budget Cycles (pages 5-6) handout to find our state’s budget cycle and fiscal year. [Pause for class to look at the handout]

Did anyone find the budget cycle for our state? [Get response]

[Use this optional statement if your state is on a biennial (2-year) budget cycle:] What do you think having our budget passed every other year means in terms of our advocacy? [Get responses]
| budget to include your priorities | By the time the budget comes out, the framework is there and will be harder to change. It’s helpful to have relationships with policymakers and staff in these departments, so you can help proactively shape the budget to include our priorities before it is finalized. Work on the next budget often begins shortly after the beginning of the fiscal year. It’s helpful to think ahead and get in the front door and start working with state agencies and legislators early. |

To help start your advocacy, let’s explore a typical state budget process.

Shortly after the start of a new fiscal year, the state’s budget office prepares guidelines for agencies, including how much money agencies can spend – or how much they need to cut – and details about the governor’s priorities. Agencies use that information to prepare budget requests, which are submitted to the governor. The budget office will review requests, meet with agency staff, hold hearings, and compile budget recommendations for the governor.

The governor takes those recommendations and works with the budget office to develop a budget proposal to present to the legislature in the early winter – usually in an address like the State of the State.

The legislature takes the governor’s budget request, reviews it, and holds hearings with agency leaders. Typically, each chamber of the legislature will create and pass their own versions of the budget. A conference committee of legislators from each chamber is appointed to resolve the differences, and the full legislatures approves the budget.

**slate 18**

**Approx. 3 min**

**Core Concept**

- Review of the state budget cycle

**Prep:**
If you know the budget calendar for your state, include it here instead of the general timeline.
The governor receives the legislature’s budget and can sign it into law or veto (disapprove of) the budget, sending it back to the legislature. Ultimately, a budget must be approved by the legislature and signed by the governor to fund services and programs, like mental health care.

*Where in the budget process do you see opportunities for advocacy? [Take 1-2 brief responses]*

Let’s take a deeper look into the legislature’s role.

Specific committees oversee the budget process and you will need to direct your advocacy towards the appropriate committees.

There are multiple committees that work on budget issues. However, we’ll focus on the budget committees that pass the final budget.

In our state, the committees that pass the budget are the [insert House/Assembly committee title] and the [insert Senate committee title].

We’ve covered *how* to get involved in the budget process, but *why* should you get involved?

To see the services and supports we believe every person with a mental health condition deserves, your voice is critical to helping policymakers understand the need and the impact of mental health funding.
### Core Concept
- Stories are critical to helping policymakers understand the need and impact of mental health funding

---

NAMI advocates on a wide range of policy issues. NAMI’s budget priorities include funding:
- **crisis services**;
- **supportive housing programs**;
- And **early intervention**, such as Coordinated Specialty Care in First Episode Psychosis Programs.

At the same time, NAMI works to fend off threats to mental health care in budgets across the country. As we discussed, mental health budgets are often unfairly the first to get cut during a difficult budget season. NAMI activates its advocates to fend off those harmful proposals and to promote stable mental health funding.

We can only achieve our priorities – and protect against budget cuts – when advocates like you share stories about why mental health funding is important.

---

Today, we’re going to dive deeper into one of those priorities – early intervention, specifically First Episode Psychosis, or FEP, programs.

Any of the advocacy tools covered today are not only for FEP programs; they can apply to any of our budget priorities.
### Core Concept

- Advocacy tools covered by FEP example apply to other budget priorities

---

<table>
<thead>
<tr>
<th>Core Concept</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Every young person experiencing psychosis deserves to realize the promise of hope and recovery</td>
<td></td>
</tr>
</tbody>
</table>

---

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>First, a little background.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Every year, roughly 100,000 youth and young adults experience a first episode of psychosis.</td>
</tr>
<tr>
<td></td>
<td>Psychosis involves loss of contact with reality, such as hallucinations, seeing or hearing things that others do not, or delusions, beliefs that are not based in reality. Symptoms can also include speech that does not make sense, difficulty thinking clearly, lack of self-care, withdrawal and odd or inappropriate behavior.</td>
</tr>
<tr>
<td></td>
<td>NAMI believes that every young person experiencing psychosis deserves to realize the promise of hope and recovery. Fortunately, early treatment provides a foundation for recovery and a full life.</td>
</tr>
</tbody>
</table>

---

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>FEP programs use a team-based approach, called coordinated specialty care, or CSC, which works with young people and their families to help young people reach their recovery goals.</td>
<td></td>
</tr>
</tbody>
</table>
Approx. .5 min
Core Concept
➢ FEP programs use a highly-effective, team-based approach called Coordinated Specialty Care

Approx. 3 min
Core Concept
➢ Research shows greater improvements in symptoms, relationships and quality of life for people who participated in FEP programs

The CSC model includes:
• Recovery-oriented psychotherapy
• Case management
• Medication management
• Family support and education
• Supported education and employment
• Peer support services

Throughout our training, we will refer to programs using this model as FEP programs for short.

Let’s spend a few minutes looking at the FEP Programs: Investing in the Promise of Hope & Recovery (page 7) worksheet in your materials.

What strikes you as valuable or interesting about this model? [Take 2 brief responses]

Research conducted by the National Institute of Mental Health, or NIMH, shows that compared to typical care, people with early psychosis who participate in FEP programs experience greater improvement in their symptoms, relationships and quality of life, are more involved in work or school and stay in treatment longer.

The sooner people get this quality care, the greater the improvements.
<table>
<thead>
<tr>
<th>Slide 26</th>
<th>Approx. 1 min</th>
<th>Core Concept</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ State funding is vital to fully fund FEP programs and make them available to everyone who needs them</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Core Concept**

State funding is vital to fully fund FEP programs and make them available to everyone who needs them.

Despite the strong research case, funding remains a challenge for FEP programs.

Thanks to NAMI’s advocacy, the federal Mental Health Block Grant provides some money for FEP programs in states. Unfortunately, that money is not enough to make programs readily available for everyone who needs one.

Also, Medicaid plans and commercial health insurance do not typically cover the full cost of FEP programs, especially supported education and employment, as well as outreach and engagement.

That’s why state funding is vital to fully fund these programs and make them available to everyone who needs them.

<table>
<thead>
<tr>
<th>Slide 27</th>
<th>Approx. 1 min</th>
<th>Core Concept</th>
</tr>
</thead>
<tbody>
<tr>
<td>“With the help of my FEP clinic team, community, family and friends, I have gotten back on track. With all of this support, I am refocused on achieving my professional goals.” - Andrew</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Core Concept**

Personal experiences are powerful tools when advocating for mental health funding.

Andrew, a young man who participated in an FEP program, was kind enough to share his experience:

“With the help of my FEP clinic team, community, family and friends, I have gotten back on track. With all of this support, I am refocused on achieving my professional goals.”

Personal experiences -- like Andrew’s and your own -- are powerful tools when advocating for funding.
### Core Concept

**您的故事是展示模型**
- 您的故事能帮助人们了解精神健康服务，并提供通往康复的路径。

我们都知道，有时很难获得精神健康服务，而且我们知道，当政策制定者不提供足够资金时会发生什么。

这就是为什么重要的原因。您分享的故事是一种方式，可以让人们知道精神健康服务可以为您的康复提供路径。

### Research shows

研究显示，能引发情感和同理心的故事比事实和数字更能影响他人。听真实的故事是改变如何向政策制定者寻求精神健康服务资金的最好方式。

### Best of all:

略作停顿：
- 您的故事永远是对的
- 您的人生经历有价值和意义
- 您不必拥有所有的答案——只是向您的听众提出一个明确的“询问”

如果您仔细考虑，就会意识到这非常令人振奋。
You don’t have to have all the answers—just a clear “ask”

However, while your lived experience is meaningful, *how you tell your story* affects your impact.

You want to make a difference, so we’ll give you some tips for telling your story about your experience with mental health services in your community.

---

**Core Concept**

- **But, some stories are more effective than others**

---

**Tips for telling your story...**

**Tip #1**

*Keep it brief—stick to the highlights*

---

The 1st tip is to **keep your story brief**.

We could all tell volumes about what has happened to us. But, you’ll lose your listeners if you spend too much time and give too many details.

Remember, we live in a world of sound bites and Twitter feeds. Keep your story short. **Aim for about 90 seconds**.

Think about a movie trailer—in 90 sec. you get the highlights and want to see more. That is what you want to achieve with your story—give just the highlights about how funding for mental health services has made a difference in your recovery and leave your listeners eager to know more.
Approx. 1 min

Core Concept
➢ Hope is a powerful motivator
➢ Think about how better funding for services would help you or others on a path to recovery

Our 2nd tip is to motivate your listener by using positive concepts like hope and recovery whenever possible.

Hope is a powerful motivator for policymakers. People like to root for those who make it through adversity—use this to your advantage.

If you struggle to think of your story as hopeful, think about how better funding for services would help you or others on a path to recovery.

Approx. 1 min

Core Concepts
➢ Make an “ask”

Here’s our last tip: Make an “ask” of your listener. This is often forgotten when people tell their stories. But as the saying goes, “If you don’t ask, you don’t get.”

Besides, policymakers want to know what you want them to do, even if they disagree. If you are talking to policymakers, let them know that you want their support to improve funding for mental health services and supports for people with mental health conditions.

You’ve just heard our three tips. What was the most meaningful thing you’ve heard so far? [Take two quick responses]
Now that we’ve gone through our tips, I’m going to share a sample story **from the perspective of** [choose the sample story you will read] (page 9 or 10). Your materials include two sample stories—one from the point of view of a peer and one from the point of view of a family member. Your own perspective is unique and you may or may not relate to these sample stories.

This story is being told as if the person were talking to a legislator on the appropriations committee. However, this story format is like a basic recipe; it can be easily adapted to fit other situations or audiences.

For now, I’d like you to keep an open mind and **notice your reactions** and what moves you or has impact for you.

**Read the sample story** with expression [you or, ideally, your Helper]

**What had impact for you or caught your attention?** [Take two to four responses]

---

<table>
<thead>
<tr>
<th>Core Concepts</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Share a sample story</td>
</tr>
<tr>
<td>➢ Story format is adaptable</td>
</tr>
<tr>
<td>➢ <strong>Listen</strong> and notice your reactions</td>
</tr>
</tbody>
</table>

---

| Prep: |
| Decide which sample story you will use before the workshop |

| Helper or Facilitator: |
| Practice the sample story out loud several times before the workshop until you can read it smoothly and with expression |

| Handout: |
| **Sample Stories** |
Now that you’ve listened to our sample story and noticed its impact, you'll need your Sample Stories (pages 9-10), your Seven Steps Checklist (page 11) and your Story Practice Sheets (pages 13-14).

The Checklist lists the elements of a brief, effective story. We’re going to review these seven elements, or steps, and compare them with the sample story you just heard. Then, you'll use these steps to write your own story.

Note: Mark the sentences in your sample story that you want people to mention when answering the questions.

Discuss 1st step
- Introduce who you are and where you’re from
- Share how you are affected by mental illness
- State your purpose—what action or decision you want

The **1st step** of an effective story is to introduce yourself and **why you are speaking or writing**.

1. Your introduction should begin by letting your audience know your name and what city or town you live in.
2. Share how you are affected by mental illness. This establishes your credibility through lived experience.
3. Let your listener know that you would like to share your story and state your purpose—what action or decision you want from them. This helps your audience focus and be more responsive.

▶ Take a moment to **mark the phrase** in the sample story that lets you know the **purpose of the speaker’s story**.

**Who would like to read the phrase that lets listeners know the speaker’s purpose?** [Pick a volunteer and ask them to read the phrase they think answers the question]
### Discuss 2nd step

- What happened before you received help?
- Should be brief, but vivid

<table>
<thead>
<tr>
<th>The 2nd step of an effective story is to describe <strong>what happened before you got the right services</strong> (or what you are going through now). Keep this very brief—think about the main highlights or most important thing your listener should know about your situation.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vivid language in this description helps your audience understand what you went through (or are going through).</td>
</tr>
<tr>
<td>➢ Take a moment to <strong>mark a line or words</strong> in the sample story that moved you or helped you understand what happened to the speaker.</td>
</tr>
<tr>
<td><strong>Who would like to read a line in the second section that moved you or helped you understand what happened?</strong> [Pick a volunteer to read the phrase they think answers the question]</td>
</tr>
<tr>
<td><strong>Did someone else mark a different phrase?</strong> [Pick a volunteer to read a phrase]</td>
</tr>
<tr>
<td>Your listeners will vary in what moves them. And, different stories will move different people. This is why it helps for multiple people to share their stories.</td>
</tr>
</tbody>
</table>

### Discuss 3rd step

- What helped in your recovery or what would help?
- Tells the listener what makes a difference

<table>
<thead>
<tr>
<th>The 3rd step is to describe <strong>what helped in your recovery</strong> (or for someone you care about) or <strong>what would help</strong>. By focusing on what helped or what would help you or others, you create a sense of hope and help your listener know what makes a difference.</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ Take a moment to <strong>mark a line</strong> in the sample story that helped you realize what helped.</td>
</tr>
<tr>
<td><strong>Who would like to share the line that struck you in the third step?</strong> [Pick a volunteer to read what helped]</td>
</tr>
</tbody>
</table>
### Discuss 4th step
- **How are you different today?**
- **Share positive note about recovery**

<table>
<thead>
<tr>
<th><strong>The 4th step</strong></th>
<th><strong>Discuss</strong> 4th step</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is to describe <strong>how you are different today.</strong> Share what is going right in your life (or someone you care about) or how you are experiencing recovery. This is how your story inspires.</td>
<td><strong>What language in the fourth step of the story left you feeling hopeful or inspired?</strong> [Ask a volunteer to read the phrase in the fourth section of the story that mentions how the writer is different today.]</td>
</tr>
<tr>
<td><strong>Handouts:</strong></td>
<td>Sample Stories Seven Steps Checklist</td>
</tr>
</tbody>
</table>

### Discuss 5th step
- **What will help others?**
- **Pivot from you to others**

<table>
<thead>
<tr>
<th><strong>The 5th step describes what is the need or problem.</strong> Transition away from your own concern to what other people need or the challenge they face that is similar to your own.</th>
<th><strong>Discuss</strong> 5th step</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Handouts:</strong></td>
<td>Sample Stories Seven Steps Checklist</td>
</tr>
</tbody>
</table>

### Discuss 6th step
- **Help make decision makers make policies that affect many people**

<table>
<thead>
<tr>
<th><strong>In 6th step, describe what will help or could help others.</strong> This should be what you want a policymaker to do or decide.</th>
<th><strong>Discuss</strong> 6th step</th>
</tr>
</thead>
<tbody>
<tr>
<td>The fifth and sixth steps are often said at the same time. They take you from your personal story to a message that is about other people. This helps decision makers who will take actions or decide on policies that will affect many people.</td>
<td><strong>Who would like to share the line that helped you sense the transition?</strong> [Pick a volunteer to share the line they marked.]</td>
</tr>
<tr>
<td><strong>Handouts:</strong></td>
<td>Sample Stories Seven Steps Checklist</td>
</tr>
</tbody>
</table>

### Discuss 7th step
- **Make your “ask.”**
- **Don’t take no or noncommittal response personally**

<table>
<thead>
<tr>
<th><strong>In the 7th and last step, make your &quot;ask.&quot;</strong> This is a critical step that many advocates hesitate or forget to do. Thank your audience for listening. Then, let them know what action or decision you want them to make on your issue.</th>
<th><strong>Discuss</strong> 7th step</th>
</tr>
</thead>
<tbody>
<tr>
<td>If your audience gives you a positive response, thank them for their support.</td>
<td><strong>What strikes you about the &quot;ask&quot; in the sample story?</strong></td>
</tr>
<tr>
<td>If your audience gives you a negative or noncommittal response, don’t take it personally. Thank them, again, and let them know you’d like to serve as a resource on mental illness.</td>
<td><strong>Handouts:</strong> Sample Stories Seven Steps Checklist</td>
</tr>
</tbody>
</table>
### What do you find helpful about the checklist? [Take 1 to 2 responses]

Now that you’ve heard a sample story and compared it to the Seven Steps Checklist, you’re ready to **find your Story Practice Sheets** (pages 13-14) and **start writing your own story**.

For help, use your Seven Steps Checklist and the sample story—or ask a question. Remember, the best preparation for telling an effective story is to **know your purpose and your “ask.”**

Here’s our scenario: pretend you are telling your story to urge policymakers to fund mental health services, like in our sample stories.

Your “ask” can be the same as in a sample story or use your own words.

**You’ll have about 15 minutes to write your story on your practice sheet.** I’ll let you know when you have a few min. left to finish up.

If you don’t finish, don’t worry. This is just a practice. You can finish it on your own time or make edits later. If it’s easier for you, feel free to write your story in “bullet points” instead of full sentences.

If you finish early, practice reading your story silently.

**Circulate:** While participants are writing, walk around the room. If participants finish early, ask if they are willing to let you read their story silently. Let them know what phrases are strong. **Keep in mind participants who have strong stories.**

**Warn participants 5 min. before end and 2 min. before time is up.**

[Use your chime, bell or other prearranged signal]

**Stop participants after 15 min.**

If you didn’t finish your story, feel free to finish in your free time. **What did you learn about writing your story?** [Take one or two responses]

### Handouts:
- Story Practice Sheets
- Seven Steps Checklist

### Helper:
- Help people find worksheets and participants with questions or struggles (this will free up Facilitator to circulate and manage time)
Approx. 15 min
Core Concepts
➢ Practice telling your story in under two min with a partner
➢ Feedback for three min
➢ Listener—use Constructive Feedback Form and keep time

You all have a good start on your story. Now, we’ll practice sharing and giving constructive feedback.

Hold onto your story and take out your Constructive Feedback Form (page 15). The form has a scale, from one to five, for each step of a story. A “one” indicates an area that could be strengthened; “three” indicates an area that works fine and a “five” indicates an area that is particularly strong or impactful.

Please find a partner and wait for our practice instructions. [Wait for partners to form]

Here are the instructions. In the next ten minutes, we’ll have two five-minute rounds of story-sharing. As a reminder, I’ll let you know when five minutes has passed with [Indicate chime, bell or other signal]. During each round:

• One person will share their story in two minutes or less.
• One person will keep time and stop the storyteller after two minutes. Use a stopwatch function on a cell phone, if available.
• Timekeeper should also listen attentively and, if possible, fill out the Constructive Feedback Form to record impressions.
• After the storyteller’s two minutes is up, provide constructive feedback—specific information about what worked well or worked fine and what could be strengthened and how. Remember that constructive feedback is not intended to be judgmental—it is intended to help you see the strengths of your story and how you could make it even more impactful.

Please begin.
Signal end of round 1 after 5 min.
It’s time to trade roles if you haven’t already.

Signal end of round 2 after 5 min.

How’d that go for everyone? What did you learn about telling your story? [Take 2 to 3 quick responses]
What was effective?
What did you learn?

slide 38

Approx. 5 min
Core Concepts

➢ Basic story is written and can serve as basis of advocacy
➢ Story can be modified to use with different audiences and issues

➤ Ask for a volunteer to share their story. Call on a person whom you think may have a good story based on what you heard or read earlier.

Thank you so much for sharing your story. Now, as listeners, what was effective for you and why? [Take two or three responses]
Note: You may ask for another volunteer if you like.

You have all accomplished a lot in just a short time. You’ve written your story and practiced it. Now, you can use your story to help make positive changes for people living with mental illness.

Best of all, the story you wrote is based on a basic structure, or recipe. That means you can make just a few changes in details and the purpose and “ask” and use it for many different issues and audiences.

Let’s learn together—what makes a story really effective?

What was most helpful or impactful for you?
[Take a couple responses to each question]

This quote, “storytelling is the most powerful way to put ideas into the world,” is a reminder that your story can—and does—influence others.

Your story can make a real difference in mental health funding.

“Storytelling is the most powerful way to put ideas into the world.”

Robert McKee

slide 39

Approx. .5 min
Core Concept

➢ Your story and actions can make a difference
One way to make an impact is to share your story with policymakers who can influence the budget. Work with your NAMI State Organization to identify opportunities to share your story where it is most impactful.

Those opportunities could include meetings with agency or legislative committee staff. If there aren’t opportunities during the budget process, consider sharing your story with the media to get the word out.

Your stories will help policymakers understand the real-life impact of mental health services and how they are funded.

And, NAMI will help keep you informed of opportunities to use your story, so be sure to sign up for advocacy alerts at www.nami.org/advocacy.

[Optional: If host knows of an opportunity, share with the group and provide any instructions]
### What did you take away from this experience today? What made an impact on you?  
(Take three responses)

---

**Helper and Facilitator:**
If possible, take a picture of participants who are willing for you to do so. Consider taking a picture of the class.

---

### Thank you all for giving your time and energy to this workshop. Please give yourselves a round of applause for everything you’ve accomplished today.  
(Wait for applause)

Before you go, please take half a minute to fill out the remainder of your Evaluation Form and turn it in to [name location or person]. We value your feedback and would like to know if this workshop was helpful to you.

---

**Prep:**
Prepare a container or place for evaluation forms and/or have Helper collect.

**Handout:**  
Evaluation Form

---

If you would like more information on NAMI Smarts for Advocacy, contact your local or state NAMI organization.