NAMI SMARTS for ADVOCACY

Volume I
This is NAMI Smarts: Telling Your Story, the foundation module in NAMI’s grassroots advocacy training series. We’ll talk about why advocacy for mental health care is so important and the power of your story to influence others. Then, we’ll guide you through writing your own powerful story in seven short steps.

When you leave this training, our goal is that you take with you a version of your story that you can use to raise awareness, to inspire others and, above all, to influence policy makers.

My name is [insert name] and I will be your teacher today. And helping us today is [insert name]. If you need help during this training, please let [Helper’s name] know.

Before we begin, I’d like to caution you that you will be writing about and sharing your story in this training. If that is something you don’t feel quite ready to do or if you find that your story is triggering grief or overwhelming you, please let our Helper know. He/she will assist you.

We hope you’re excited about this training. Are you ready to join us? [Wait for a response, if appropriate.] Great, we’ll get started.

To begin, please take out your pre- and post-training evaluation form and spend half a minute filling 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 training.

[Give your participants less than a minute to fill out the first two questions.]
Most of you have probably been in trainings or workshops before. And you may realize that trainings don’t always translate into doing things differently.

Before we begin our training, we’re going to look at what the research shows about converting training into practice.

Converting training into practice takes more than listening to a presentation.

- A typical workshop may result in retaining about 5 percent of what you hear.
- Adding a demo doubles the results.
- Practicing doubles the retention again.
- Getting constructive feedback brings up the odds to 25%.

This training includes the first four elements to help you learn and retain. But, as you can see, in-situation coaching bumps up the learning to 90%.

We’d like you to do this after the training by debriefing with a partner or a group after you’ve shared your story, written an email or had a conversation or meeting with a policymaker.

By debriefing, you can learn what worked and what could help you be even more effective the next time.
<table>
<thead>
<tr>
<th>Agenda</th>
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<tbody>
<tr>
<td>1. Why your story is important</td>
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<tr>
<td>2. Tips for telling your story</td>
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<tr>
<td>3. Listen to an example</td>
</tr>
<tr>
<td>4. What makes a story “work”</td>
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<tr>
<td>5. Write your own story</td>
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<tr>
<td>6. Practice your story and feedback</td>
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**Core Concepts**
- Training format is info, demo, debrief, prep and practice and feedback
- Difference between personal advocacy and policy advocacy
- Policy advocacy is focus of training

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NAMI Smarts: Telling Your Story is formatted to build on what the research shows is effective:
- First, you will hear why your advocacy is needed.
- Next, you’ll hear tips for how to bring *skill* to your passion and advocacy.
- Then, you will hear an example, followed by a debriefing of what makes the example work. This brings in the demonstration piece.
- Lastly, you will write, practice and give feedback on what you learned.

*How does this sound to you?* [Wait for group to respond.]

Before we move on, let's talk about the difference between personal advocacy and policy advocacy. When you advocate to influence circumstances or services for yourself or someone you care about, you are engaging in **personal advocacy**.

When you advocate to improve circumstances for others, you are engaging in **policy advocacy**.

**Today's training is focused on policy advocacy**—using your story with policy makers to help people living with mental illness.
This training covers a lot of ground in a short amount of time. In order for everyone to get the most out of this training, I’d like to ask you to agree to the following basic ground rules:

- Participate fully
- Keep us on time (avoid getting side-tracked or involved in conversations) and
- Turn off your cell phones.

By “participate fully,” we mean being willing to do each of the activities. It also means putting away distractions so you can be focused and take in this training.

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.

And, please come back from breaks on time because we’ll be starting promptly.

We encourage comments at appropriate times in the training. Because of time constraints, we ask that you please hold longer or unrelated comments, questions or opinions until breaks or after the training.

*Are you willing to participate fully? Are you willing to follow these ground rules?* [Ask for participants to affirm by a show of hands.]
### Core Concepts

- What makes a story less effective?
- What makes a story more effective?

When it comes to telling your story to a policymaker, it’s helpful to know what makes a story less effective and what makes a story more effective. Let’s brainstorm what you feel makes a story less or more effective.

I’ll read the first question and I’d like you to raise your hand if you’d like to share a possibility. Let’s try to get 5-10 responses to each question on our flip chart (or PowerPoint) in the next few minutes.

<table>
<thead>
<tr>
<th>Prep:</th>
<th>Decide if you will use PowerPoint slides or flip charts for activity</th>
</tr>
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<tbody>
<tr>
<td>Helper:</td>
<td>Record 5-10 brainstormed responses on each flip chart page or on PowerPoint slide</td>
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</table>

For those of you who are new to advocacy or sharing your story, this training will build skills step-by-step, so it should feel very comfortable. And if you find you need more time, know that you can always use your materials to continue working on your story after the training is over.

For those of you who have a lot of experience, you will see that this workshop is also designed to enhance your skills and help you be even more effective.
<table>
<thead>
<tr>
<th>Slide 8</th>
<th>Approx. 1 min</th>
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<tbody>
<tr>
<td>Total time: 31 min</td>
<td></td>
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<tr>
<td>Core Concepts</td>
<td></td>
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<tr>
<td>- Everyone deserves the opportunity to experience recovery</td>
<td></td>
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<tr>
<td>- Recovery doesn’t mean the absence of symptoms or life we expected</td>
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As we mentioned in our agenda, we’ll begin by talking about why your story is important to share. It’s simple. It is because every American who experiences mental illness deserves the opportunity to experience recovery.

By “recovery,” we don’t necessarily mean the absence of symptoms of mental illness or the life we expected.

Instead, we mean managing life with a mental illness, including improving our health and wellness, striving to reach our potential and to form meaningful connections with others.

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<tr>
<th>Slide 9</th>
<th>Approx. .5 min</th>
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<tbody>
<tr>
<td>Total time: 31.5 min</td>
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<tr>
<td>Core Concept</td>
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<tr>
<td>- Your story illustrates that treatment works and recovery is possible</td>
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</table>

Why is it important to share your story? Because treatment works and recovery is possible, especially when we feel we are valued as a whole person and our individual perspectives and needs are respected. Your story is the perfect way to share this concept with others, particularly policy makers.
| Core Concept | Sharing your story is important because mental illness is common:  
| | **One in four to five adults experiences a mental health disorder.**  
| | **One in 17 adults lives with a serious mental illness**, such as schizophrenia, major depression or bipolar disorder.  
| | **More than one in 10 children and youth** has a serious mental health condition.  
| | And we know that mental illness affects everyone, regardless of race and ethnicity, sexual orientation, gender or age.  
| | (*Note: In the past, we used one in four because national statistics showed that 23 percent or more of adults in the U.S. had a mental health disorder. More recently, the reported percentage has dropped to 20 percent, or one in five adults.*)  
|  
| Core Concepts | Yet, even though mental illness is very common, **most people don't get the mental health care they need.**  
| | **There is an average delay of 8 to 10 years** before people get help for their mental illness.  
| | Fewer than half of children and adults with mental health conditions receive **any** treatment at all.  
| | And those that do receive treatment often don't get the services and supports they need.  
| |
And without mental health care, we all pay the price. One way is with **school failure**. Students with serious mental health conditions have the highest dropout rate of any disability group in the country.

**We also pay a high price in unemployment.** Most adults with serious mental illness don't get the supports they need to get and stay employed.

**We pay a high price in homelessness.** Over one in four of people who are homeless lives with severe mental illness. When people don't get treatment and help in maintaining a job, they often end up homeless.

**And in criminalization.** When youth and adults don't get the treatment they need to manage their illness, they often end up in jails and prisons.

And without mental health care, we sacrifice our future to **suicide**. Every fifteen minutes, we lose one life to suicide.

Suicide is the 10th leading cause of death in our nation and the third leading cause of death from ages 10 to 24. Most people who die by suicide were affected by mental illness.
As people whose lives have been affected by mental illness, we need to speak up about the things that matter. We need to speak up…

- To protect public mental health funding,
- To expand access to mental health coverage and
- To ensure that effective mental health services are available.

Your story is a way to speak up. It helps illustrate what happens and what helps. By telling your story in a compelling way, you help change attitudes and influence policy makers’ support for mental health care.

Our lives begin to end the day we become silent about things that matter.”

Martin Luther King, Jr.

Approx. 1 min
Total time: 35 min

Core Concepts

- We need to speak up:
- To protect public mental health funding
- To expand access to mental health funding
- To ensure that effective mental health services are available
- Your story is a way to speak up, change attitudes and influence policy makers
<table>
<thead>
<tr>
<th>Core Concepts</th>
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</thead>
<tbody>
<tr>
<td>Emotion shapes opinions more than facts</td>
</tr>
<tr>
<td>Real stories is one of the best ways to promote support for mental health care</td>
</tr>
<tr>
<td>Your story is always right</td>
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<tr>
<td>Your lived experience has value and meaning</td>
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<tr>
<td>You don’t have to have all the answers—just a clear “ask” of your listeners</td>
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**Research shows** that stories that evoke emotion and empathy are far more powerful than facts and figures in shaping the opinions of others.

**Hearing real stories** is one of the quickest and surest ways to promote support for mental health care and increase understanding and acceptance of people who live with mental illness.

Keep these thoughts in mind:
1. **Your story is always right**
2. **Your lived experience has value and meaning**
3. **You don’t have to have all the answers—just a clear "ask" of your listeners**

[Pause slightly after each of these concepts to let people process.]

If you think about it, this is very empowering to realize.
### Slide 16

**Approx. .5 min**  
**Total time:** 37.5 min  
**Core Concept**  
- How you tell your story can affect your impact

### Slide 17

**Approx. .5 min**  
**Total time:** 38 min  
**Core Concepts**  
- Your audience does not want to hear your life story  
- Your audience wants to be moved—and uplifted

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However, while our lived experiences are meaningful, **how we tell** our story can affect the impact we make.

This brings us to the second part of our agenda. A few tips for telling your story...

The first tip is that *your audience does not want to hear your life story.*

Save those details for your therapist or a close friend. Your audience does, however, want to be moved—and uplifted.
Now for our second tip: Your audience also wants your story to be **brief**. Remember, we live in a world of sound bites and text messages. Keep it short or you’ll lose your audience. **Aim for a minute or two** and leave your audience wanting more.

We all could tell volumes about what has happened to us. We could probably write a chapter on a single incident alone. But, you will lose your listeners if you spend too much time and give too many details about what happened.

Think about a movie trailer—in 30 sec. you get the highlights and want to see more. That is what you want to achieve with your story—give the highlights that leave your listeners wanting to know more.

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**Tip #3**

**Emotion should move—not overwhelm**

We mentioned that stories that evoke emotion are powerful. However, if your story causes you to cry, it will overwhelm others and they will shut down.

If your story elicits emotion—but without causing you to break down or tear up—you will likely move others. That is the right amount of emotion to move, not overwhelm.

If you find your story brings up tears or trembling in you, focus on the aspects that don’t bring up as much pain or use language that allows you to maintain composure.
Another tip is to use positive concepts like hope and recovery, if possible. Hope is a powerful motivator for policy makers. People usually like to root for those who make it through adversity—use this to your advantage.

Here’s our last tip: Make an “ask” of your listener. If you are talking to a policy maker, let them know what would help others (such as supporting mental health care) and then, ask them if you can count on their support.

This puts them on the hook by asking them for a commitment. This will tell you a lot. If they commit, you have a supporter. If they say no or they are noncommittal, you know where they stand and that you need to follow up and nurture the relationship to build support.

Don’t take a negative or noncommittal response personally. Your listener may be under intense pressure to take a particular position on your issue or may be being cautious. Take it in stride and work to build a positive relationship.

You’ve just heard a lot of information. What was the most meaningful information or point you’ve heard so far? [Take two to three quick responses.]
| slide 22 | Now that we’ve gone through our tips, I’m going to share a sample story.  
This story is from the perspective of [choose the sample story you will read]. Your materials include two other sample stories from different perspectives. Your own story and perspective is unique and you may or may not relate to these sample stories.  
This story is also told as if the person were giving testimony at a legislative hearing. However, this basic format, or recipe, can be easily adapted to fit other situations.  
For now, however, 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.  
What language moved you?  
What had impact for you or caught your attention? [Take two to four responses.] |
|---|---|
| Approx. 5 min | Prep: Decide which sample story you will use before the training  
Practice your sample story until you can read it smoothly and with expression  
Worksheet: Sample Story |
| Total time: 48 min | |
Now that you've listened to our demo story and noticed its impact, you'll need your **Sample Story** (pages 1-3), your **Seven Steps Checklist** (page 4) and your **Story Practice Sheet** (pages 5-6).

The Checklist lists the core elements of a brief, effective story. We're going to review these seven steps and note how they apply to the demo you just heard. Then, you'll use these steps to practice writing your own story.

<table>
<thead>
<tr>
<th>Core Concept</th>
<th>Worksheets: Seven Steps Checklist and Sample Story</th>
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</thead>
<tbody>
<tr>
<td>Apply Seven Steps Checklist to sample story</td>
<td>Helper: Help people find worksheets as needed</td>
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</table>
**Core Concepts**

- Introduce yourself
- Who you are, where you're from—why this helps elected officials
- How are you affected by mental illness?
- What is your purpose—what do you want listener to support or oppose or do?

The first 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. This helps your listener, especially elected officials, feel connected. Elected officials “place” people by where they live.

2. You should also share how you are affected by mental illness, whether you live with a mental illness, are a family member, caregiver or are affected in some other way. This gives you credibility and brings a “real face” to mental illness.

3. Lastly, your introduction should let your listener know that you would like to share your story and your purpose—what you want them to support or oppose or do. This simple statement gives your listener clarity about your intent and helps them focus and be responsive.

Worksheets: Seven Steps Checklist and Sample Story

Take a moment to underline or 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 you think lets listeners know the speaker’s purpose?**

[Pick a volunteer and ask them to read the phrase they think answers the question. You’re looking for "I’d like to share his/my story and ask for your support of mental health services."]
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, and your listeners will vary in what moves them. And different stories will move different people.

Vivid language in this description can help your audience understand or empathize with what you went through. It can help them understand your situation.

The second step of an effective story is to describe what happened before you received the help you needed. Keep this very brief—think about the main highlights or most important thing that happened before you received the help you needed. Keep this very brief—think about the main highlights or most important thing that happened before you received the help you needed.

Vivid language helps your audience understand what happened before you received the help you needed. Vivid language in this description can help your audience understand or empathize with what you went through.

Know about your situation. Know about your situation. Know about your situation. Know about your situation. Know about your situation. Know about your situation. Know about your situation. Know about your situation. Know about your situation. Know about your situation. Know about your situation.
The third step is to describe **what helped in your recovery** (or for someone you care about). By focusing on what helped, you create a sense of hope that is uplifting.

If your story doesn't have a hopeful component—someone or something that helped—then describe what would have helped or what could help others avoid a bad outcome.

This step—describing what helped or would have helped—is also important because it lets your listeners know what makes a difference.

Take a moment to underline or mark a line in the sample story that helped you realize what helped.

**Who would like to share the line that struck you in the third step?**

[Pick a volunteer to share the line they marked.]
**Core Concept**
- How are you different today?
- Concludes story on inspirational note

| The fourth step is to describe **how you are different today**. This is your opportunity to share what is going right in your life (or in the life of someone you care about) or how you are experiencing recovery. This concludes your personal story on a positive note that inspires. |
|---|---|---|
| **What language in the fourth step of the story left you feeling hopeful or inspired?** |
| [Ask a volunteer to read the phrase in the fourth section of the story that mentions how the writer is different today.] | **Worksheets: Seven Steps Checklist and Sample Story** |
In the fifth step and sixth step, answer what is the need or problem and what will help others?

In step five, transition to what others need or the problem they face.

In step six, describe what will help or could help others. This should be what you want a policy maker to support (or to oppose).

These steps take you from your personal story to a message that relates to other people—and makes your story relevant to a policy maker.

Who would like to share the line that helped you sense the transition?

[Pick a volunteer to share the line they marked.]
**Core Concepts**

- Make your “ask”
- Don’t take no or noncommittal response personally
- Follow up regularly to build the relationship
- What struck you about the “ask?” How do you see it being helpful?

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**In the seventh and last step,** make your "ask." This is a critical step that many advocates hesitate or forget to do. Start by thanking your listener for meeting with you and listening to your story. Then, put them on the hook by asking if you can count on them to support (or oppose) your issue.

If your listener answers with a clear “yes” or affirmative reply, thank them for their support.

If your listener answers with a clear “no” or negative response or with an unclear or noncommittal response, thank them, again, for taking the time to meet with you and let them know you’d like to serve as a resource for them on mental health issues.

Regardless of the response you get, plan on following up regularly and politely to build a relationship. This will help you gently shift opinions or, in the case of a supporter, to help build a legislative champion.

**What struck you about the "ask" in the sample story? How do you see it being helpful?** [Take a response or two.]

**What did you find helpful about the checklist? Does it make structuring your story simpler for you?** [Take a response or two.]

[Note: This can be a good time to take a short break if training time allows.]
Now that you’ve heard a demo and walked through the Seven Steps Checklist, you’re ready to find your Story Practice Sheet (pages 5 and 6) 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 the scenario to use for your story. Please pretend you are telling your story to urge policymakers to protect mental health services, just like in our sample stories.

Your “ask” can be the same as in the sample story or, if you can, put it in your own words.

You’ll have close to 20 minutes to fill out your story 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 and you can finish or modify on your own time. Also, 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.

Stop participants after 20 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.]
You have all finished or have a good start on your story. Now, we’ll practice sharing them and giving constructive feedback.

To get ready, please take out your Story Practice Sheet and your two Constructive Feedback Forms (pages 7 and 8).

Look at your Constructive Feedback Form. You’ll notice that this form covers the seven steps of telling your story. The form has a scale, from one to five, with a one indicating an area that could be strengthened, three indicating an area that works fine and a five indicating an area that is particularly strong or impactful.

Each of you will have a chance to share your story in a group of three (or you may be part of a pair). When it’s your turn to share your story, you will be the “Storyteller” and will tell your story in two minutes or less.

One person in each group will be the Timekeeper. In this role, you’ll time the storyteller and stop him or her after two minutes. Make sure you have a watch or timer to use. While you time, also listen to the story and your reaction to the flow, language that moves you and areas that could be strengthened.

The other person in the group will play the role of Listener. The Listener will use the constructive feedback form to quickly record impressions. Also, the Listener will use the spaces on the form to jot notes about what specifically came across as strong or recommendations for how to strengthen through either edits or practice.

If you are part of a pair, instead of a trio, one person will have to be both timekeeper and listener.

After the storyteller’s two minutes is up, the group should provide brief constructive feedback that gives specific information about what worked in the story—and what could be improved and how.

Remember that constructive feedback is not intended to make you feel bad—it is intended to help you see the strengths of your story and where and how you could make it even more effective.
Please get in **groups of three** (there may be one pair). Find a couple people at your table or nearby to form your group and let me know when you’re ready for me to explain your roles.

[Wait until everyone is in a trio or pair.]

You’ll have just 4 min. for each round for storytelling **and** feedback, so use your time wisely so you can each gain the most from this experience. If you finish early in your round, please wait quietly for the signal for the next round. Or, you can edit your stories further.

**Stop round 1 after 4 min.**
It’s time to trade roles and begin with another storyteller and feedback.

**Stop round 2 after 4 min.**
We're in our last round. Please trade roles again.

**Stop round 3 after 4 min.**

*How’d that go for everyone? What did you learn about telling your story? What helpful feedback did you hear?*

[Take two or three quick responses.]

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Ask for a volunteer who would like to share their story. Call on one person whom you think may have a good story based on what you heard or read while circulating the room.

*Thank you so much for sharing your story. Now, what were people’s reactions? What was effective for you and why? [Take two or three responses]*
### Core Concepts
- Basic story is written and can serve as basis of advocacy.
- Story can be modified to use with different audiences and issues.

Now that you’ve written your story in just 20 min., you can rely on it as the base of your advocacy. You’ve already done the hard work.

Your basic story is like a candidate’s stump speech—or a basic recipe. You can use it over and over. And, with just a few changes in details or focus, you can target your story to different audiences and for a range of issues.

**What did you take away from this experience today?**
**Do you feel more prepared to tell your story and advocate than you did walking in?**
**What was most helpful or impactful for you?**
**What does this change for you?**
**Where do you plan to use your story?**

[Take a few quick responses to each question.]

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**We value your feedback**

*Please turn in your evaluation form*

**Approx. 2 min**
**Total time: 2 hr**

Please remember to fill out your post-training evaluation and turn it in to [name location or person].

[End of Deletion if you are training multiple modules]

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**Worksheet: Pre- and Post-Training Evaluation**

*Helper or Teacher:*
- Assist in collecting evaluations.
INSERT TAB: MODULE 1 WORKSHEETS
Sample Family Member Story

1. My introduction

Hello, I'm Jenny Jones from Springville. I’m a member of NAMI Springville, part of America’s largest grassroots mental health organization, the National Alliance on Mental Illness.

I’m also the proud mother of a 23 year old son who lives with bipolar disorder. I’d like to share my story with you and ask for your support of mental health services.

2. What happened

When my son was still a toddler, I had a thought that no mother should have: I wondered if my beautiful boy would be in juvenile detention on his 16th birthday. He just did not respond the way other children did to requests, to routines, to daily life and love.

As he grew, we never knew what would be broken, who might be hurt or when it would happen.

3. What helped

In fifth grade, my son's teacher said, "Jenny, honey, I've taught hundreds and hundreds of kids. I know when a boy is misbehaving and I know when something is wrong. And something is wrong. You just keep looking for help."

When Andy was finally diagnosed with bipolar disorder, our lives changed. With treatment, he started smiling, enjoying school and making friends.

4. How I’m different today

On his sixteenth birthday, Andy wasn’t in juvenile detention; he was creating art. Today, he’s enjoying life, working hard and making me proud.

5. What is the need or problem

My son is proof that treatment works. But, not everyone gets the help they need.

6. What will help others

A strong mental health system will help children and adults get the right care at the right time.

7. My "ask"

Thank you for meeting with me and listening to my story. Can I count on you to protect mental health services—and give families the hope of recovery?
Sample Peer Story

1. My introduction

Hello, I’m Shannon Johnson from Springville. I’m a member of NAMI Springville, part of America’s largest grassroots mental health organization, the National Alliance on Mental Illness.

As a person who lives with schizophrenia, I’d like to share my story with you and ask for your support of mental health services.

2. What happened

I was married and had a successful career in business. I worked hard and never imagined I would experience a mental illness. But, I did.

I started seeing a therapist after experiencing nightmares, nervousness and problems going to work. I thought that with a few visits to a therapist, these problems would be over. But, my symptoms got worse and worse. Eventually, I lost everything.

3. What helped

With the help of a psychiatrist who diagnosed me with schizophrenia, I found my way back again. I will always remember him telling me that having schizophrenia did not mean life was over. He gave me hope.

4. How I’m different today

Today, I’m proud to be working again and volunteering with NAMI’s In Our Own Voice program.

5. What is the need or problem

Many people have mental illnesses like mine, but not everyone gets the help they need.

6. What will help others

A strong mental health system helps more people get the right care at the right time to experience recovery.

7. My "ask"

Thank you for meeting with me and listening to my story. Can I count on you to protect mental health services?
Sample Story of Loss

1. My introduction

Hello, I’m Jerry Jackson from Springville. I’m a member of NAMI Springville, part of America’s largest grassroots mental health organization, the National Alliance on Mental Illness.

I’m here because of my brother, Tom, who struggled with major depression. I’d like to share his story and ask for your support of mental health services.

2. What happened

My brother was a great athlete, made good grades and always had my back.

But after he entered college, my brother started battling depression. He wrestled with a painful darkness that held him in its grip—and he lost. He took his life two years ago. And I lost my best friend.

3. What would have helped

Nothing will ever bring back my brother, but I know that mental health treatment can save lives.

4. How I'm different today

Today, it’s still difficult to talk about Tom, but I’m speaking up to help others.

5. What is the need or problem

Suicide is the tenth leading cause of death in our country, but most Americans with mental illness aren’t getting the help they need.

6. What will help others

A strong mental health system will help more people get the right care at the right time and, very likely, spare another family the worst phone call they’ll ever get.

7. My "ask"

Thank you for meeting with me and listening to my story. Can I count on you to protect mental health services?
# Seven Steps to Telling Your Story

The following seven steps will help you craft a succinct and powerful story.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
</table>
| 1. | **Introduce yourself**  
Give your name and city or town. Include your organization. We encourage you to describe yourself as “a member of [NAMI State Org or NAMI Affiliate], part of America’s largest grassroots mental health organization, the National Alliance on Mental Illness.”  
Share how you are affected by mental illness. Are you living with mental illness, a family member, a caregiver? This brings a "real face" to mental illness.  
State your issue and position. Let your listener know what you want them to support or oppose (or do). This helps your listener focus. |
| 2. | **What happened?**  
What happened before you received the help you needed? Keep this brief--think about the most important thing you’d like your listener to know. |
| 3. | **What helped?**  
Describe what helped in your recovery (or would have helped). This adds a hopeful tone and helps show the value of services and supports. |
| 4. | **How are you different today?**  
Share what is going right in your life or how you are experiencing recovery. This concludes your personal story on a positive note that inspires. |
| 5. | **What is the need or problem?**  
Mention the problem or need you want addressed. Transition to the challenge(s) faced by people living with mental illness. |
| 6. | **What will help others?**  
Talk about what will help. Let your listener know what will address the need or problem you described. |
| 7. | **Make your "ask"**  
Ask your policymaker if you can count on their support (or opposition). Include a bill number, if possible. Thank your policymaker for his or her time. |
### 1. My introduction

Include your name and city and organization, if applicable. We encourage you to describe yourself as “a member of [NAMI State Org or NAMI Affiliate], part of America’s largest grassroots mental health organization, the National Alliance on Mental Illness.” Add how you are affected by mental illness and your issue and position.

### 2. What happened

Aim for 3-9 sentences. Briefly describe the most important and compelling thing(s) about your situation.

### 3. What helped

Aim for 1-5 sentences. Briefly describe what helped in your recovery (or what would have helped). Aim for a hopeful tone that helps show what is helpful.
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<tr>
<td><strong>4. How I'm different today</strong></td>
<td>Aim for 1-3 sentences. Share what is going right in your life or how you are experiencing recovery. This concludes your personal story on a positive note that inspires.</td>
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<td><strong>5. What is the need or problem</strong></td>
<td>Aim for 1-2 sentences. Transition to the challenge(s) faced by people living with mental illness that you want addressed.</td>
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<tr>
<td><strong>7. My &quot;ask&quot;</strong></td>
<td>Aim for 1-2 sentences. Thank your listener for listening to you. Then, ask your listener for a commitment. Be specific.</td>
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</table>
Constructive Feedback Form for Telling Your Story

In the space below each scale, identify where the *story was strong or impactful* or what would strengthen the story.

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<thead>
<tr>
<th>Introduction</th>
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Constructive Feedback Form for Telling Your Story

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</table>
Common Greetings

The following are common greetings that will help you properly address elected officials.

<table>
<thead>
<tr>
<th>Official</th>
<th>Address</th>
<th>Greeting for Letter or Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governor</td>
<td>The Honorable (Full Name) Governor of (State) (Office Address)</td>
<td>Dear Governor (Last Name)</td>
</tr>
<tr>
<td>State Senator</td>
<td>The Honorable (Full Name) (Office Address)</td>
<td>Dear Senator (Last Name)</td>
</tr>
<tr>
<td>State Representative</td>
<td>The Honorable (Full Name) (Office Address)</td>
<td>Dear Representative (Last Name)</td>
</tr>
<tr>
<td>State Assemblyman</td>
<td>The Honorable (Full Name) (Office Address)</td>
<td>Dear Assemblyman or Assemblywoman (Last Name)</td>
</tr>
<tr>
<td>U.S. Senator</td>
<td>The Honorable (Full Name) United States Senate (Senate Office Building) Washington, D.C. (zip)</td>
<td>Dear Senator (Last Name)</td>
</tr>
<tr>
<td>U.S. Representative</td>
<td>The Honorable (Full Name) House of Representatives (House Office Building) Washington, D.C. (zip)</td>
<td>Dear Representative or Congressman or Congresswoman</td>
</tr>
</tbody>
</table>
How to Contact Elected Officials

The following are several options for contact information for elected officials.

<table>
<thead>
<tr>
<th>NAMI Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take advantage of NAMI’s Legislative Action Center.</td>
</tr>
<tr>
<td>• Go to <a href="http://www.nami.org/advocacy">www.nami.org/advocacy</a></td>
</tr>
<tr>
<td>• Enter your zip code under “Find your elected officials” to get links to phone numbers, addresses, and email addresses for your state and federal officials.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Web Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search the Web for your state’s legislature or general assembly. When there, find out how to get to contact pages or a Find Your Legislator page.</td>
</tr>
<tr>
<td>Note your policymakers’ contact information in an easy-to-find place, like next to your phone or computer. Put your policymakers’ email addresses into your email contacts.</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Legislative Guides</th>
</tr>
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<tbody>
<tr>
<td>Some legislatures print handy legislative guides with maps, pictures of policymakers, contact info, and useful information. Where available, these are often free or very reasonably priced and a “trade secret” of lobbyists.</td>
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</tbody>
</table>
My Commitment

Today, I learned and practiced how to advocate effectively with elected officials. Now, I commit to act.

<table>
<thead>
<tr>
<th>In the next 48 hours, I will:</th>
</tr>
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<tbody>
<tr>
<td>“How wonderful it is that nobody need wait a single moment before starting to improve the world.” — Anne Frank</td>
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</table>

<table>
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<tr>
<th>In the next week, I will:</th>
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<tr>
<td>“Act as if what you do makes a difference. It does.” — William James</td>
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<table>
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<tr>
<th>Over the next three months, I will:</th>
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<tr>
<td>“Knowing is not enough; we must apply. Willing is not enough; we must do.” — Goethe</td>
</tr>
</tbody>
</table>
NAMI Smarts for Advocacy

Telling Your Story Evaluation

Trainer's Name: _______________________________ Date of Training: __________

Location of Training (City & State): ____________________________________________

My Name (optional, but preferred): ____________________________________________

1. Overall, my knowledge and skill level in telling my story is...

   | Before the training: (Circle your rating) | After the training: (Circle your rating) |
   | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
   | 1  2  3  4  5  6  7  8  9  10 | 1  2  3  4  5  6  7  8  9  10 |
   | None | Some | Good | Excellent |

2. Overall, my level of confidence in telling my story is...

   | Before the training: (Circle your rating) | After the training: (Circle your rating) |
   | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
   | 1  2  3  4  5  6  7  8  9  10 | 1  2  3  4  5  6  7  8  9  10 |
   | None | Some | Good | Excellent |

3. What did you learn that was most meaningful or helpful to you today?

4. Where do you plan to use your story? Or, what will you do differently as a result of this training?

5. What comments, if any, do you have about this training?

6. NAMI seeks to support the entire community. 
   To help us track how we are doing and for funding purposes, please check all that apply.

   I am: 
   □ American Indian or Alaska Native 
   □ Asian American 
   □ Black or African American 
   □ Hispanic or Latino 
   □ Native Hawaiian, Pacific Islander 
   □ White 
   □ Multiracial 
   □ Other: ____________________________ 

   □ Person living with a mental illness 
   □ Family of adult living with a mental illness 
   □ Parent or legal guardian of minor-aged child living with a mental illness 
   □ Mental health service provider, including peer provider 
   □ Other mental health advocate 
   □ Military service member, veteran or military family member 
   □ Other: ____________________________
INSERT TAB: Module 2 Script
This is Module 2: Contacting Your Policymaker, the second module in our NAMI Smarts for Advocacy training. It builds on our foundation, Telling Your Story. In this module, our goal is that you will leave this training with the confidence and ability to quickly write powerful and personalized emails and make phone calls that influence policy makers.

My name is [insert name] and I will be your Teacher today. And helping us today is [insert name]. If you need help during this training, please let [Helper’s name] know.

Before we begin, I’d like to caution you that you will be writing about and sharing your story in this training. If that is something you don’t feel quite ready to do or if you find that your story is triggering grief or overwhelming you, please let our Helper know. He/she will assist you.

We hope you’re excited about this training. Are you ready to join us? [Wait for a response, if appropriate.] Great, we’ll get started.

To begin, please take out your pre- and post-training evaluation form (page 18) and spend half a minute filling 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 training. [Give your participants half a minute to fill out the first two questions.]
This training covers a lot of ground in a short amount of time. In order for everyone to get the most out of this training, I’d like to ask you to agree to the following basic ground rules:

- Participate fully
- Keep us on time (avoid getting side-tracked or involved in conversations) and
- Turn off your cell phones.

By “participate fully,” we mean being willing to do each of the activities. It also means putting away distractions so you can be focused and take in this training.

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. And, please come back from breaks on time because we’ll be starting promptly.

We encourage comments at appropriate times in the training. Because of time constraints, we ask that you please hold longer or unrelated comments, questions or opinions until breaks or after the training.

Are you willing to follow these ground rules? [Ask for participants to affirm by a show of hands.] [End of Deletion if you are training multiple modules]
Here is our agenda for Contacting Your Policymaker so you'll know what to expect:

1st, we'll talk about the importance of writing emails and making phone calls;

2nd, we'll give you some quick tips;

3rd, we'll share an example of a personalized email and a quick email. **After that**, we'll take a closer look at what makes an email effective, write our own personalized email and get feedback during a practice.

Then, we'll share examples of phone calls, take a look at what makes a phone call more powerful and practice in pairs.

---

**Why write emails and make phone calls?**

*Because every American who experiences mental illness deserves the opportunity for recovery*

---

**We'll begin** by reviewing why people who care about mental health should be writing emails and making phone calls to elected officials. If you've taken *Telling Your Story*, you'll recognize this. The answer is simple: It's because every American who experiences mental illness deserves the opportunity to experience recovery.

Everyone deserves the opportunity to be productive and healthy. To have that opportunity, Americans need—and want—access to quality mental health care.
Yet, mental illness is a leading cause of disability in our country.

I’d like you to think about these two questions:
1. Why is there so much disability as a result of serious mental illness?
2. Why aren’t more people experiencing recovery?

Think about this telling statistic: The majority of adults and half of children who need treatment for mental illness are not getting any mental health care.

And you are probably all too aware that even those children and adults who are getting mental health services are often not getting the right care at the right time and place.

If people can’t get the mental health treatment and supports they need, they don’t have the opportunity they deserve to experience health and productivity—to experience recovery. And they are more likely to experience disability from their mental health condition.
**Core Concepts**

- **It’s time to change the statistics**
- We need people to speak up about three priority issues:
  - Protect public mental health funding,
  - Expand access to mental health coverage and
  - Ensure that effective mental health services are available.

If you want to improve the opportunities for recovery, it’s important to make an impact with policy makers.

Why? **Because policy makers** (such as state legislators and members of Congress) **cast votes** for budgets and laws that fund public mental health services, determine who’s eligible for care and what services are available to children and adults living with mental illness.

*Do you think it’s time to change that?* [Pause—wait for a yes.]
And in today’s world, one of the most important ways to impact policymakers is through emails and phone calls.

Here’s why they make such a difference:
- Legislation can move rapidly. **Email and phone alerts are critical to keep grassroots pressure** on the right policy makers at the right time.

**Emails and phone calls represent the “public pulse”** on an issue, which is important to policy makers. That’s why policymakers and their staffers record the issue and position of every writer or caller. The more emails and phone calls a policymaker receives, the more they take notice.

Most everyone is used to making phone calls and writing emails, so they may seem deceptively easy. But, **how and when** we write emails and make phone calls makes a difference.
This brings us to the second part of our agenda. A few tips for emails and phone calls…

The first tip is that numbers count. As we mentioned a few minutes ago, policymakers literally count the number of calls and emails they receive on an issue and what position their constituents are taking.

While a few issues generally capture the public’s attention and generate a lot of emails and phone calls, most issues don’t. In fact, most people don’t vote, let alone write or call their policymakers.

Because so few people actually contact their elected officials, policymakers believe that a single email or call represents the views of anywhere from 10 to 100 constituents.

This gives you an advantage. If you take the time to write or call, you’re making a larger impression than you might think.

If you get your friends and family to write, as well, you’ll be exponentially more influential.

And, if you call or write more than once a session, you’ll find that your policymaker and their staff will begin to recognize you. With the right approach, you can build a good rapport—and exert an even greater influence.
### Tip #2: Timing is everything

**Core Concept**
- Timing calls and emails in groups can make a greater impact
- Grouping is particularly effective for rural districts

Second, emails and phone calls that are *timed to come in groups* can make an unexpected impact.

If five advocates in a county all call a policy maker within the same hour, the policymaker or staff will think the phone is ringing off the hook and that your issue is “hot.”

Likewise, if your policymaker receives several emails in one morning or day, he or she will think your issue is raising a lot of attention.

This second tip about timing is especially effective in rural and frontier districts. Rural policymakers usually get far fewer constituent phone calls and emails than their urban counterparts—so a sudden flurry of emails or calls gets noticed.

Use this knowledge to your advantage. Whenever possible, coordinate your efforts with people you know and make an even bigger impact.

---

### Tip #3: Make it personal

**Core Concept**
- Describing why an issue is important personally makes an impact

Our third tip is to make it personal.

The good news is that your emails and phone calls will count no matter what. But the even better news is that when policy makers hear why an issue is important to you personally or hear a highlight of your story, you’ll make an even stronger impression.
Approx. 3 min  
Total time: 20 min

| Tip #4 | Make an "ask" |

**Core Concept**
- Make an “ask”
- Listen for answer you get
- Don’t take a negative or noncommittal response personally

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<tr>
<td>And our last tip, which you also heard in <em>Telling Your Story</em>, is to make an “ask.” In your emails and phone calls, you have an opportunity to let your policymakers know how they can help people who live with mental illness and to ask if you can count on their support.</td>
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<tr>
<td>Asking for a commitment is an important way to gauge how they will vote.</td>
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<tr>
<td>But, if they don’t commit, don’t take it personally. Your policymaker may be under intense pressure from their party (or caucus) to vote a particular way.</td>
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<tr>
<td>Take it in stride, but don’t give up. Just realize that you will need to follow up and work to build their support.</td>
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**What did you take away from these tips?**

*Was there anything that caught your attention or that you want to try out?* [Take two to three quick responses.]
We’ve talked about the importance of emails and phone calls and given you some tips, so we’re ready for our demo.

Emails and phone calls are the most effective when they are in response to an action alert or are about a pending issue or vote.

Find your Action Alert (page 1) in your materials and follow along as I read the alert to set the scenario we’ll use today.

**Read the Action Alert.**

The national office of NAMI sends out action alerts to people who have signed up for E-News when advocacy is needed on federal issues. Your state organization, local affiliate or a coalition may do the same. Responding to action alerts makes a difference in fast-moving legislation. And we’re going to show you just how powerful your email response can be.

**Read the Personalized Email (page 2).**

See how much impact a personalized email has?

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

But, if you are very busy, a “quick” email is an easy and effective option.

**Read the Quick Email (page 3) example.**

Notice that in the quick email, the talking points are copied right from the action alert. There’s just a short introduction and closing statement added. Yet, it still packs a punch.
Let's look at what makes an advocacy email effective.

Find your Checklist for Advocacy Emails (page 4) in your materials and also take out your personalized email sample for reference. This checklist may look familiar. It has some of the same elements as the Six Steps to Telling Your Story Checklist, with a few new elements.

1. The very first item is **Use your subject line.** This is important because it's the first thing a policy maker notices when they scroll through their inbox.

   A subject line that makes a request for action will stand out. Including a bill number, if possible, is also helpful. It will allow a policymaker or staff to print out your email and put it in a bill file. This is important because policymakers refer to a bill file before they take a vote.

2. The second checklist item is to **begin your email with a respectful salutation,** like Dear Senator Walker. This is simple: just use the elected title, like senator or assemblyman, and the elected official's last name. Using a proper title sets a professional tone.

3. Next, your email should indicate your issue and the action or position you'd like your policymaker to take.

   This is important because even if a policymaker or staff doesn't read any further, they are already clear about your issue and where you stand.

4. The fourth step is optional, but it helps personalize your email.

   Describe why this issue is important to you or include how you are affected by mental illness.

---

**Worksheet: Checklist for Advocacy Emails and Sample Personalized Email**

What caught your attention about the lines in the “Why it’s personal” section? How might they be valuable in an email?

[Take a quick response or two. Reflect back that vivid language, “mental health care can make the difference between despair and recovery…” invites the reader to be emotionally engaged.]
5. The next step is to either provide a brief highlight of your story that is relevant—or to make one or more brief points relevant to the issue.

Worksheet: Checklist for Advocacy Emails and Sample Personalized Email

Would someone like to read the story section from the personalized email? [Wait for a volunteer to read.]

How did these lines affect you?

[Take a quick response or two. Reflect back that these three lines highlight an important aspect of the writer’s story and make an emotional impact. Add that writers can borrow or edit lines from the stories they developed in Telling Your Story, if they like.]
### Core Concept
- Make an “ask”—action or position you want policymaker to take

---

6. The sixth checklist step is to make an “ask.” This should describe the action or position you want your policymaker to take. If a vote on a bill is involved, it’s helpful to politely ask how they intend to vote on your issue.

---

**Worksheet: Checklist for Advocacy Emails and Sample Personalized Email**

**What strikes you about the line, “Please let me know how you intend to vote on HB 39”?**

[Take a quick response or two. Reflect back that not only does this suggest that you are looking for a commitment—it sets you up for potentially receiving a reply. If you get a reply, it gives you an opportunity to thank your elected official and build the relationship.]
Core Concepts

- Thank your policymaker
- Include your full contact information

7. The last two steps are to thank your policymaker and include a polite closing, your name, address, phone number and email.

Including your full contact info allows your policymaker to recognize you as a constituent and add you to his or her mailing list, if you are not already (this is important to policymakers, who must stay connected with voters in their district to get reelected). It also helps the policymaker respond to your request for a reply (and this is important to you).

Worksheet: Checklist for Advocacy Emails and Sample Personalized Email

What did you learn in this demo and checklist that was most meaningful to you?

How will this affect how you approach emails?

[Take a couple of quick responses.]
Now that you understand the power of a few short lines in a personalized email, we are going to practice writing an email using a brief highlight from your story.

Do you see how useful learning to tell your story is? You can use lines from it—or variations on it—in different forms, with different issues and with different audiences—to make your point. You have already done the hard work of writing your story; now we want you to get some great mileage out of it.

Find your Personalized Email Practice Sheet (page 5) and take out your Action Alert (page 1) and Checklist for Advocacy Emails (page 4). Feel free to also refer to you Story Practice Sheet from Module 1 and the Personalized Email sample (page 2).

Here is our scenario: Pretend you just received the Action Alert. Your goal is to write an email urging your policymaker to protect mental health in HB 39, the mental health budget.

You'll have 10 minutes to write your email. Remember, this is just practice and it does not need to be perfect.

Warn participants after 8 min that they have 2 min left to finish.

Stop participants after 10 min.

What did you learn about writing an email?
How will what you learned change your response to alerts in the future?
[Take one or two responses.]
Ask for a volunteer who is willing to share their email and receive constructive feedback. [Select an individual who has a strong email that you noticed while circulating during the writing process.]

[Lead applause and thank the volunteer for sharing their email.]

What was effective about this email? [Take a couple of responses.]

If you’d like to hear another volunteer, select another participant and repeat the process.

It is amazing how powerful an email can be. And don’t forget that if you are short on time, the quick email option is also very effective.

One more point: You can easily draft an email—or save this one—and use it as the starting point when you receive an alert. That way, you only need to make slight modifications to suit the situation. You can be done in just a few minutes—and you’ll be making a significant difference as an advocate.
Approx. 5 min
Total time: 1 hr 5 min

Core Concepts
- An elevator speech is an extra-short version of your story
- Usually spoken face-to-face

Optional Section: You’ve worked on your emails and you can see how powerful they can be. Let’s use what you just accomplished and take it just one step further to craft an “elevator speech.”

What is an “elevator speech?” It comes from the marketing world and it refers to an extra-short version of your story. Think in terms of about 30 seconds or less—the time to go from one floor to the next in an elevator. That’s why they call it an “elevator speech.” Besides being short, another difference is that an elevator speech is spoken face-to-face, usually while walking or standing.

Let me show you how this sounds when you string these pieces together. You can follow along with your Sample Elevator Speech (page 7).

Read the elevator speech below.

Hello Senator, I'm Jenny Jones from Springville. I'm a member of NAMI Spring Valley, part of America’s largest grassroots mental health organization, the National Alliance on Mental Illness.

I’m here today because I’d like to urge you to protect mental health services in HB 39.

As the mother of a son with bipolar disorder, mental health care is important to me and my family. With treatment, my son made an amazing recovery.

But with cuts to mental health centers, most people can’t get the help they need.

Families like mine need your vote to protect mental health services. Can we count on your support for mental health in HB 39, Senator?

After you get a response from your listener, be certain to thank them and, to be even more effective, plan on following up with them.
Core Concepts

- Elevator Speech Checklist contains familiar elements: Introduction, issue and position, story highlight, problem, solution and “ask”

Optional Section: As you heard, an elevator speech is very short and to the point. If you have more time or you’re asked questions, be ready to add other tidbits from your story or talking points, such as a fact or two on mental illness.

The key is to be prepared so you don’t have to think about it. One good way is to practice with others.

Find your Elevator Speech Checklist (page 8). You’ll notice that it is very simple—and it includes some familiar elements.

1. First, introduce yourself, where you’re from and that you’re with NAMI. “I am [name] from [city, town or county you live in] and I’m a member of NAMI, the National Alliance on Mental Illness.”

2. If it’s appropriate and enough time, you can describe NAMI further, “We are the nation’s largest grassroots mental health organization dedicated to building better lives for the millions of Americans affected by mental illness.” This is optional.

3. State your issue and position. Modify this from what you used in your email. For example, you might say, “I’d like to urge you to protect the mental health budget in HB 39.” Give a bill number if at all possible.

4. Make it personal. In just one brief line or two, describe why this issue matters to you personally or how you’re affected by mental illness. If your listener is impatient, you can skip this and go straight to your “ask.”

5. Mention the problem or need you want addressed.

6. Let your policymaker know what will help address the need or problem.

7. Make your “ask.” Mention that the elected official’s vote or help is needed and ask if you can count on their support.

8. As always, say thank you.
Optional Section: Now you’ll get a chance to practice your own elevator speech. Find your Elevator Speech Practice Sheet (page 9) and personalize it.

We’ll take just five minutes to do this. Don’t worry if you don’t finish—you’ll have a framework you can complete later, if you need to. If you finish early, practice your elevator speech silently.

Stop participants after 5 min.

Make sure you have participants’ attention, then move to practice.

Worksheet: Elevator Speech Practice Sheet

Helper: Help individuals who have special needs or questions (free up Teacher to circulate and manage time)

Teacher: Circulate and look for individuals with strong elevator speeches
Optional Section: As you know, practice helps us get comfortable with our delivery. That's especially important with an elevator speech because you have to be ready when the opportunity strikes.

I'd like you to find a partner at your table or nearby and let me know when you're ready to practice.

[Wait for everyone to find a partner. If one person is left, ask a couple to form a trio.]

In the next few minutes, take turns practicing your elevator speech. If you have time, feel free to practice more than once.

Stop participants after 4 min.

Who would like to share their elevator speech? [Pick a volunteer to share.]

What was effective about this elevator speech? [Take a response or two.]

Where else do you think your elevator speech will be useful? [Take a response or two.]

As you can see, an elevator speech is helpful to have prepared and memorized. And, with a few modifications, you can use it not only for advocacy, but to describe what your NAMI organization does to a potential donor or member—or your friends and family.

I want to encourage you to think about this and craft your own elevator speech or speeches appropriate for occasions that you experience frequently.
A phone call with an elected official is an excellent opportunity to start forming a relationship. The same applies if you talk with a staff person. This is because—no matter what you might think—the opinions of legislative staff are very important to policymakers. And, they are the gatekeepers to your elected official. Treat them like gold.

If you make a couple of phone calls or more, you’ll start to recognize voices—and your elected official or their staff will recognize yours. You’ll be surprised how quickly you can develop a connection over the phone.

But, phone calls are most effective if you are both polite and prepared. Here’s why you need to be prepared: You never know who will answer and what your opportunity will be.

Your elected official may answer the phone or you may be transferred to him or her. Or, you may get a staff person or voicemail.

We’ve got you covered. We’ll demonstrate two situations and show you how to sound professional and get your point across.

**Demonstrate Phone Call with a Policymaker** (page 10).

Did you notice how the phone call is very brief, yet makes a clear “ask” and weaves in a personal touch, just like a personalized email?

Now, let’s get ready for other phone scenario. If you get a voicemail system or a staff person, here’s what it can sound like:

**Demonstrate Leaving a Phone Message** (page 11).

Did you notice how leaving a phone message takes about 30 seconds and a live call just a bit longer? It takes just a minute to make a difference.

Let’s talk about leaving a voice mail or getting a staff person. People are often disappointed or unprepared to leave a message on voicemail or with a staff person. Don’t be. Use it to your advantage.

When you leave a brief, focused message, you get to make your point...
about your issue (which your policymaker—and often a staff person, as well—will hear).

If you add a request for your policymaker to return your call (our demo said, “Would you please ask the Representative to return my call?”) you will **may get the opportunity to make your point again and chat with your policymaker.** This means you’ll have made two impressions about your issue—mental health.

Your **Checklist for Making a Phone Call (page 12)** gives you all the tips you need to prepare yourself for making phone calls to policymakers.

Take a minute to look at the checklist and think about the demos.

*How did working on your email help prepare you for a phone call? What’s the same in both an email and a phone call?* [Take a couple of quick responses.]
### Core Concept
- **Prep for a phone call using your email**

As we mentioned in our tips, it’s important to prepare for an advocacy-related phone call so that you are ready to state your issue and position, add a touch of story or talking points and restate your issue and your “ask.”

Because you did much of the prep work while working on your email, you’ll find that this is fairly easy.

### Core Concepts
- **Personalize Advocacy Phone Call**
- **Take a few minutes to...**
  - Read the phone script and insert your own words to personalize
  - Describe how you are affected by mental illness
  - Add an important highlight from your story
  - Hint: Borrow from your email

Find your **Script: Advocacy Phone Call (page 13)**. You’ll notice that most of a phone call is scripted out for you, but there are a few places to add your own personal touches. These places are noted in brackets and lighter print.

Using the work you did in your emails, spend a few minutes jotting notes on this script to personalize it where indicated.

As soon as you’re done, you can start practicing the script silently.

**Stop participants after 5 minutes.**

If you’re not finished, don’t worry. You can ad lib during our next activity.
### Core Concepts
- Find a new partner for practice
- Practice phone call script
- Take 5 min

#### Practice!
Pair up and take turns practicing

- **Find a new partner** that you haven’t worked with already and let me know when you’re ready to practice.

  [Wait for participants to be paired up. You may have to help form one trio.]

  With your partner, practice taking turns as participant 1 (a constituent) and participant 2 (who will play the part of both a receptionist and Senator Walker). When it is your turn to be participant 1, the constituent, read from your own personalized script.

  **We’ll only take about 5 minutes to do this activity.**
  **Stop participants after 5 minutes.**

  **What did you learn from that experience? Did you notice how professional and effective your phone calls are with a little preparation?** [Take a couple of quick responses.]

---

#### Congratulations!
What did you discover today?

[Start of Deletion if you are training multiple modules]  

**How many of you felt like writing an email or making a phone call was fairly easy?**

**What was most helpful or impactful for you?**

**What do you think you will you do differently as a result of today’s training?**

**What did you take away from this experience today?** [Take a few quick responses to each question.]

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.
Please remember to fill out your post-training evaluation and turn it in to (name location or person). [End of Deletion if you are training multiple modules]
INSERT TAB: Module 2 worksheets
Sample Action Alert

ACT NOW TO PROTECT MENTAL HEALTH CARE
With revenues coming up short, legislators are proposing to cut millions of dollars from needed community mental health services. Case management and recovery services are at risk. Don't let the legislature balance the budget on the backs of people living with mental illness! *Speak up now.*

**Contact your Senator**
Time is short. **Call or email your Senator this week** and let him or her know that you are a constituent and are counting on him or her to protect mental health services in HB 39.

Make it personal: let him or her how your life has been affected by mental illness and the difference services make in promoting recovery.

**Talking Points:**
- One in four adults experiences a mental health condition, including our returning troops.

- Mental illness is common and, with the right care, people can experience recovery.

- When people don’t get the mental health treatment they need, costs shift as people end up in jail, out of work and in emergency rooms.
Sample Personalized Email

Subject line
Protect Mental Health in HB 39

Greeting
Dear Senator Walker:

Issue and position
I am writing to urge you to protect the mental health budget.

Why it's personal
I am the mother of a son with bipolar disorder and I can tell you that mental health care can make the difference between despair and recovery. I have seen it in my own family.

Story or talking points
My son is a young adult who is enjoying life, working hard and making me proud.

But before he got the treatment he needs, I saw him in the back of police cars and held him in my arms after a suicide attempt. No child—and no family—should have to go through this.

The “ask”
Your help is needed to protect services and help families living with mental illness. Please let me know how you intend to vote on HB 39.

Thank you
Thank you for your attention to mental health care.

Closing
Respectfully,

Jenny Jones
5555 NW Hill Ave.
Springville, OR 97999
(555) 555-5555
jjones@fernhill.com
Sample Quick Email

Subject line

Protect Mental Health in HB 39

Greeting

Dear Senator Walker:

Issue and position

I am writing to urge you to protect the mental health budget.

Talking points

One in four adults experiences a mental health condition, including our returning troops. Mental illness is common and, with the right care, people can experience recovery. But, when people don’t get the mental health treatment they need, costs shift as people end up in jail, out of work and in emergency rooms.

The “ask”

Your help is needed to protect mental health services. Please let me know how you intend to vote on HB 39.

Thank you

Thank you for your attention to mental health care.

Closing

Respectfully,

Jenny Jones
5555 NW Hill Ave.
Springville, OR 97999
(555) 555-5555
jjones@fernhill.com
# Checklist for Advocacy Emails

**Tip:** Be polite and avoid strong language to prevent misinterpreted emails. Don’t write anything you wouldn’t be embarrassed to have forwarded to others. If you’re in doubt, revise or don’t send.

<table>
<thead>
<tr>
<th>✔ ✓</th>
<th>Use your subject line</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ ✓</td>
<td><strong>Identify your issue and position.</strong> Use the subject line to identify a bill or issue and specify your support, opposition, or request for action.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>✔ ✓</th>
<th>Start with a greeting</th>
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<tbody>
<tr>
<td>✔ ✓</td>
<td><strong>Properly address your policy maker.</strong> Begin with “Dear [Elected Title] [Last Name].”</td>
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<tr>
<th>✔ ✓</th>
<th>State your issue and position</th>
</tr>
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<tbody>
<tr>
<td>✔ ✓</td>
<td><strong>Indicate why you are writing.</strong> Let your policymaker know the position or action you would like him or her to take on your issue.</td>
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<table>
<thead>
<tr>
<th>✔ ✓</th>
<th>Optional: Make it personal</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ ✓</td>
<td><strong>Describe why this legislation matters to you personally.</strong> Include how you are affected by mental illness.</td>
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</tbody>
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<table>
<thead>
<tr>
<th>✔ ✓</th>
<th>Optional: Add your story or talking points</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ ✓</td>
<td><strong>Option 1: Add a brief highlight of your story.</strong> In one to three sentences, describe an important part of your story that is relevant to the issue.</td>
</tr>
<tr>
<td>✔ ✓</td>
<td><strong>Option 2: Make one to three brief points.</strong> Talk about the impact of the issue or bill and/or why the bill is needed.</td>
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<thead>
<tr>
<th>✔ ✓</th>
<th>Make your “ask”</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔ ✓</td>
<td><strong>Ask your policymaker if you can count on their support (or opposition).</strong> Be specific about the action or position desired. Include a bill number, if possible. Option: Politely ask your policymaker to tell you how he/she intends to vote.</td>
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<tr>
<th>✔ ✓</th>
<th>Say thank you</th>
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<tr>
<td>✔ ✓</td>
<td><strong>Thank your policymaker for their time or for their attention to your issue.</strong></td>
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<tr>
<th>✔ ✓</th>
<th>Add a closing</th>
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<tr>
<td>✔ ✓</td>
<td><strong>Choose a respectful closing.</strong> Follow with your name, address, phone number, and email address. This allows your policymaker to respond to your request.</td>
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</table>
## Personalized Email Practice Sheet

### My subject line
Identify your bill or issue and support, opposition, or request for action.

### My greeting
Address your policymaker formally. Begin with “Dear [elected title] [last name]:”

### My issue and position
Indicate why you are writing and the position or action you would like your policymaker to take.

### Why it’s personal
Describe why this legislation matters to you personally and how you are affected by mental illness.

### My story or talking points
In one to three sentences, add a brief highlight of your story that is relevant. Or, make one to three brief points.
### My “ask”
Describe (again) the action or position you want your elected official to take. Politely ask them to tell you how they intend to vote.

### My thank you
Thank your elected official for their time or for their attention to your issue.

### My closing
Choose a respectful closing. Follow with your name, address, phone number, and email address.
Sample Elevator Speech

Introduction

Hello Senator, I’m Jenny Jones from Springville. I'm a member of NAMI Spring Valley, part of America's largest grassroots mental health organization, the National Alliance on Mental Illness.

Issue and position

I’m here today because I’d like to urge you to protect mental health services in HB 39.

Why it’s personal

As the mother of a son with bipolar disorder, mental health care is important to me and my family. With treatment, my son made an amazing recovery.

The need or problem

But with cuts to mental health centers, most people can’t get the help they need.

What will help others

Families like mine need your vote to protect mental health services.

The “ask”

Can we count on your support for mental health care in HB 39, Senator?
### Checklist for Elevator Speech

**Note:** After introductions, you may alter the order of items to make your message flow logically and smoothly.

<table>
<thead>
<tr>
<th></th>
<th>Introduce yourself</th>
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<tr>
<td>✓</td>
<td>Address your policymaker <strong>by their elected title.</strong> Add their last name, if you like. Then, introduce yourself, where you’re from and your organization.</td>
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<table>
<thead>
<tr>
<th></th>
<th>State your issue and position</th>
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<tr>
<td>✓</td>
<td>Let your policymaker know what you want them to support or oppose (or do). If needed, describe the issue in a very brief sentence or two.</td>
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<table>
<thead>
<tr>
<th></th>
<th>Make it personal</th>
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<tbody>
<tr>
<td>✓</td>
<td><strong>Describe why this issue matters to you personally.</strong> Include how you are affected by mental illness.</td>
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<tr>
<th></th>
<th>Optional: Add a story highlight and/or talking point</th>
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<tbody>
<tr>
<td>✓</td>
<td>Provide a brief highlight of your story and/or a talking point. In one to three sentences, describe an important part of your story that is relevant and/or make a point about your issue or the impact of your bill.</td>
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<tr>
<th></th>
<th>What is the need or problem?</th>
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<tr>
<td>✓</td>
<td><strong>Mention the problem or need you want addressed.</strong> Transition to the challenge(s) faced by people living with mental illness.</td>
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<th></th>
<th>What will help others?</th>
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<tr>
<td>✓</td>
<td><strong>Propose a solution.</strong> Let your policymaker know how a bill or their action will help address the need or problem you described.</td>
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<th></th>
<th>Make your “ask”</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Ask your policymaker if you can count on their support (or opposition). Be specific about the action or position you want them to take. Include a bill number, if possible.</td>
</tr>
</tbody>
</table>
Elevator Speech Practice Sheet

**My introduction**
Address your policymaker by their elected title. Introduce yourself, where you’re from and your organization. Note: We encourage you to describe yourself as “a member of [NAMI State Org or NAMI Affiliate], part of America’s largest grassroots mental health organization, the National Alliance on Mental Illness.”

**My issue and position**
Let your listener know what position or action you want him/her to take on your issue. If needed, describe the issue in a brief sentence or two.

**Why it’s personal**
Describe why this issue matters to you and how you are affected by mental illness.

**Optional: My story or talking point**
Add a highlight of your story and/or make a point about your issue or impact of your bill.

**What is the need or problem**
In a sentence or two, briefly describe the challenge you want addressed.

**What will help others**
Let your listener know how a bill or their action will address the need or problem.

**My “ask”**
Ask your listener if you can count on their support (or vote or other action) on your issue or bill.
Demo: Phone Call with a Policymaker

**Introduction**

**Jenny (Constituent):** “Hello, this is Jenny Jones and I’m a constituent from Springville. May I please speak to Senator Walker?”

**Ryan (Receptionist):** “Yes, the Representative’s schedule is free for just a few minutes. I’ll put you through.”

**Jenny:** “Thank you.”

**Senator Walker:** “Hello Ms. Jones, this is Senator Walker. How are you doing today?”

**Issue and position**

**Jenny:** “Hello, Senator. I’m calling about HB 39, the mental health budget. I really want to urge you to protect mental health care.”

**Why it’s personal**

**Jenny:** “As the mother of a son with bipolar disorder, mental health issues are important to me.”

**Senator Walker:** “Well, you know I was a co-sponsor of parity and I have always supported mental health issues. But we are facing some serious shortfalls this year and I’m afraid it’s going to be a very tough year for budgets. There’s just not enough to go around.”

**Story or talking points**

**Jenny:** "I appreciate your support, Senator. I realize it's a difficult economy, but mental health care can make the difference between tragedy and recovery. I know, because I have seen my son in the back of police cars and I've held him after a suicide attempt. But with treatment, he made an amazing recovery.

**The need or problem**

**Jenny:** “Unfortunately, there are lots of people who need help who aren’t getting it.”

**What will help others**

**Jenny:** “We need more mental health services, not fewer.”

**Senator Walker:** “I’m really glad you called, Ms. Jones, and I’m happy to hear your son is doing well. We’re going to be looking at the budgets very closely and I’ll keep your concerns in mind—I know how important mental health is and I appreciate hearing your perspective.”

**The “ask”**

**Jenny:** “Thank you so much for your taking my call, Senator. I hope I can count on your vote to protect mental health services in HB 39.”
Demo: Leaving a Phone Message

Introduction

Jenny (Constituent): “Hello, my name is Jenny Jones and I’m a constituent from Springville. May I please speak to Senator Walker?”

Ryan (Receptionist): “The Senator is in a hearing right now. May I take a message?”

Issue and position

Jenny: “Yes, thank you. I’m calling to urge Senator Walker to protect mental health care in HB 39. I’m the mother of a son with bipolar disorder, so I know that mental health services help people experience recovery.

I appreciate the Senator’s attention to mental health issues and look forward to her support. Would you please ask the Senator to return my call at her earliest convenience?”

Ryan: “I’ll be happy to leave the Senator your message. Her schedule is very full, so it may take a few days for her to return your call. What number can she reach you at?”

Jenny: “I can be reached at (555) 555-5555. Thank you so much for your help.”
# Checklist for Advocacy Phone Calls

A 30-second phone call is an easy way to quickly make a difference with policymakers.

<table>
<thead>
<tr>
<th>✓</th>
<th>Introduce yourself</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Say hello.</strong> Identify yourself by your name and mention that you are a constituent and the city or town you live in.</td>
<td></td>
</tr>
<tr>
<td><strong>Ask to speak to your policymaker.</strong> If unavailable, ask if staff will relay your message and ask for a call back. If you get voicemail, leave your message there.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>✓</th>
<th>State your issue and position</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Indicate why you're calling.</strong> Let your policymaker know your issue and the position or action you want him or her to take. Include a bill number, if possible.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>✓</th>
<th>Make it personal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Describe why this issue matters to you personally.</strong> Include how you are affected by mental illness.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>✓</th>
<th>Optional: Add your story or talking points</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Option 1: Add a highlight of your story.</strong> In one to three sentences, describe an important part of your story that is relevant to the issue.</td>
<td></td>
</tr>
<tr>
<td><strong>Option 2: Make a point or two.</strong> Talk briefly about the impact of the issue or bill.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>✓</th>
<th>What is the need or problem?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mention the problem or need you want addressed.</strong> Transition to the challenge(s) faced by people living with mental illness.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>✓</th>
<th>What will help others?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Propose a solution.</strong> Let your policymaker know what will help address the need or problem you described.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>✓</th>
<th>Make your “ask”</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Express your hope for their support.</strong> Let your policymaker know, again, the action or position you would like them to take.</td>
<td></td>
</tr>
<tr>
<td><strong>Thank your elected official.</strong> Let your policymaker know you appreciate their time. Option: Ask for a call back if you were not able to speak to your policymaker directly.</td>
<td></td>
</tr>
</tbody>
</table>
Advocacy Phone Call Script Sheet

<table>
<thead>
<tr>
<th>My introduction</th>
<th>Fill in information indicated by brackets.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participant 1 (Constituent):</strong></td>
<td>“Hello, this is [your name] and I’m a constituent from [town or city you live in]. May I please speak to the Senator?”</td>
</tr>
<tr>
<td><strong>Participant 2 (Receptionist):</strong></td>
<td>“Yes, the Senator’s schedule is free for just a few minutes. I’ll put you through.”</td>
</tr>
<tr>
<td><strong>Participant 1 (Constituent):</strong></td>
<td>“Thank you.”</td>
</tr>
<tr>
<td><strong>Participant 2 (Senator Walker):</strong></td>
<td>“Hello [name of caller]. This is Senator Walker. How are you doing today?”</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>My issue and position</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participant 1 (Constituent):</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Why it’s personal</th>
<th>Fill in information indicated by brackets.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participant 1 (Constituent):</strong></td>
<td>[Briefly describe how you’re affected by mental illness and the importance of this issue to you.]</td>
</tr>
</tbody>
</table>

<p>| <strong>Participant 2 (Senator Walker):</strong> | “Well, you know I have always supported mental health issues. But we are facing some serious shortfalls this year and I’m afraid it’s going to be a very tough year for budgets.” |</p>
<table>
<thead>
<tr>
<th><strong>My story or talking points</strong>&lt;br&gt;Fill in information indicated by brackets.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participant 1 (Constituent):</strong>&lt;br&gt;“I appreciate your support, Senator. I realize it’s a difficult economy, but mental health care can make the difference between tragedy and recovery.” [Alter this line, if needed. Add a highlight from your story or a brief point or two.]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>The need or problem</strong>&lt;br&gt;Optional: Fill in information indicated by brackets.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participant 1 (Constituent):</strong>&lt;br&gt;“Unfortunately, there are lots of people who need help who aren’t getting it.” [Alter this line, if needed, to describe the problem or the need.]</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>What will help others</strong>&lt;br&gt;Optional: Fill in information indicated by brackets.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participant 1 (Constituent):</strong>&lt;br&gt;“We need more mental health services, not fewer.” [Alter this line, if needed, to fit your story.]</td>
</tr>
</tbody>
</table>

| **Participant 2 (Senator Walker):**<br>“I’m really glad you called, [name of caller].<br>We’re going to be looking at the budgets very closely and I’ll keep your concerns in mind—I know how important mental health is and I appreciate hearing your perspective.” |

<table>
<thead>
<tr>
<th><strong>My “ask”</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participant 1 (Constituent):</strong>&lt;br&gt;“Thank you so much for taking my call, Senator. I hope I can count on your vote for mental health services in HB 39.”</td>
</tr>
</tbody>
</table>
## Common Greetings

The following are common greetings that will help you properly address elected officials.

<table>
<thead>
<tr>
<th>Official</th>
<th>Address</th>
<th>Greeting for Letter or Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Governor</td>
<td>The Honorable (Full Name) Governor of (State) (Office Address)</td>
<td>Dear Governor (Last Name)</td>
</tr>
<tr>
<td>State Senator</td>
<td>The Honorable (Full Name) (Office Address)</td>
<td>Dear Senator (Last Name)</td>
</tr>
<tr>
<td>State Representative</td>
<td>The Honorable (Full Name) (Office Address)</td>
<td>Dear Representative (Last Name)</td>
</tr>
<tr>
<td>State Assemblyman</td>
<td>The Honorable (Full Name) (Office Address)</td>
<td>Dear Assemblyman or Assemblywoman (Last Name)</td>
</tr>
<tr>
<td>U.S. Senator</td>
<td>The Honorable (Full Name) United States Senate (Senate Office Building) Washington, D.C. (zip)</td>
<td>Dear Senator (Last Name)</td>
</tr>
<tr>
<td>U.S. Representative</td>
<td>The Honorable (Full Name) House of Representatives (House Office Building) Washington, D.C. (zip)</td>
<td>Dear Representative or Congressman or Congresswoman</td>
</tr>
</tbody>
</table>
## How to Contact Elected Officials

The following are several options for contact information for elected officials.

<table>
<thead>
<tr>
<th></th>
<th>NAMI Web site</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Take advantage of NAMI’s Legislative Action Center.</td>
</tr>
<tr>
<td></td>
<td>- Go to <a href="http://www.nami.org/advocacy">www.nami.org/advocacy</a></td>
</tr>
<tr>
<td></td>
<td>- Enter your zip code under “Find your elected officials” to get links to phone numbers, addresses, and email addresses for your state and federal officials.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Web Search</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Search the Web for your state’s legislature or general assembly. When there, find out how to get to contact pages or a Find Your Legislator page.</td>
</tr>
<tr>
<td></td>
<td>Note your policymakers’ contact information in an easy-to-find place, like next to your phone or computer. Put your policymakers’ email addresses into your email contacts.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Legislative Guides</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Some legislatures print handy legislative guides with maps, pictures of policymakers, contact info, and useful information. Where available, these are often free or very reasonably priced and a “trade secret” of lobbyists.</td>
</tr>
</tbody>
</table>
My Commitment

Today, I learned and practiced how to advocate effectively with elected officials. Now, I commit to act.

<table>
<thead>
<tr>
<th>In the next 48 hours, I will:</th>
</tr>
</thead>
<tbody>
<tr>
<td>“How wonderful it is that nobody need wait a single moment before starting to improve the world.” —Anne Frank</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In the next week, I will:</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Act as if what you do makes a difference. It does.” —William James</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Over the next three months, I will:</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Knowing is not enough; we must apply. Willing is not enough; we must do.” —Goethe</td>
</tr>
</tbody>
</table>
NAMI Smarts for Advocacy: 
Contacting Your Policymaker Evaluation

Trainer’s Name: _______________________________   Date of Training: __________

Location of Training (City & State): ____________________________________________

My Name (optional, but preferred): ____________________________________________

1. Overall, my knowledge and skill level in contacting my policymaker is...

   Before the training: (Circle your rating)
   After the training: (Circle your rating)

   1 2 3 4 5 6 7 8 9 10
   None Some Good Excellent

2. Overall, my level of confidence in contacting my policymaker is...

   Before the training: (Circle your rating)
   After the training: (Circle your rating)

   1 2 3 4 5 6 7 8 9 10
   None Some Good Excellent

3. What did you learn that was most meaningful or helpful to you today?

4. Where do you plan to use your story? Or, what will you do differently as a result of this training?

5. What comments, if any, do you have about this training?

6. NAMI seeks to support the entire community. To help us track how we are doing and for funding purposes, please check all that apply.

   I am:
   □ American Indian or Alaska Native
   □ Asian American
   □ Black or African American
   □ Hispanic or Latino
   □ Native Hawaiian, Pacific Islander
   □ White
   □ Multiracial
   □ Other: ________________________

   □ Person living with a mental illness
   □ Family of adult living with a mental illness
   □ Parent or legal guardian of minor-aged child living with a mental illness
   □ Mental health service provider, including peer provider
   □ Other mental health advocate
   □ Military service member, veteran or military family member
   □ Other: ________________________
INSERT TAB: Module 3 Script
This is NAMI Smarts: Meeting Your Policymaker, the third module in NAMI’s grassroots advocacy training series. Over the next few minutes, we’ll take the skills you learned in Telling Your Story and Contacting Your Policymaker and take them a step further. We’ll walk you through some strategies to make your meetings more successful and give you practice on delivering your message in-person.

When you finish, our goal is that you will feel much more confident and capable of meeting with and influencing your policymakers.

[Start of Deletion if you are training multiple modules] My name is [insert name] and I will be your Teacher today. And helping us today is [insert name]. If you need help during this training, please let [Helper’s name] know.

Before we begin, I’d like to caution you that you will be writing about and sharing your story in this training. If that is something you don’t feel quite ready to do or if you find that your story is triggering grief or overwhelming you, please let our Helper know. He/she will assist you.

We hope you’re excited about this training. Are you ready to join us? [Wait for a response, if appropriate.] Great, we’ll get started.

To begin, please take out your pre- and post-training evaluation form (page 34) and spend half a minute filling 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 training. [Give your participants less than a minute to fill out the first two questions.]
This training covers a lot of ground in a short amount of time. In order for everyone to get the most out of this training, I’d like to ask you to agree to the following basic ground rules:

- Participate fully
- Keep us on time (avoid getting side-tracked or involved in conversations)
- Turn off your cell phones.

By “participate fully,” we mean being willing to do each of the activities. It also means putting away distractions so you can be focused and take in this training.

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. And, please come back from breaks on time because we’ll be starting promptly.

We encourage comments at appropriate times in the training. Because of time constraints, we ask that you please hold longer or unrelated comments, questions or opinions until breaks or after the training.

Are you willing to follow these ground rules? [Ask for participants to affirm by a show of hands.] [End of Deletion if you are training multiple modules]
### Agenda

- Why meetings are important
- Tips for meeting with legislators
- Listen to a sample meeting
- What makes a meeting “work”
- Prepare for a meeting
- Practice a one-on-one meeting
- Practice a group meeting

---

<table>
<thead>
<tr>
<th>slide 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Approx. 1 min</strong></td>
</tr>
<tr>
<td><strong>Total time: 7 min</strong></td>
</tr>
<tr>
<td><strong>Core Concept</strong></td>
</tr>
<tr>
<td>➢ Training format</td>
</tr>
</tbody>
</table>

**Here is our agenda for the training so you'll know what to expect:**

1st, we'll talk the importance of in-person meetings;
2nd, we'll give you some quick tips;
3rd, we'll share a demonstration of a meeting with a policymaker

**After that,** we'll look at what makes a meeting work and how you can prepare for a meeting. Lastly, we'll practice—first a one-on-one meeting, then a two-on-one meeting.

---

<table>
<thead>
<tr>
<th>slide 4</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Approx. 1 min</strong></td>
</tr>
<tr>
<td><strong>Total time: 8 min</strong></td>
</tr>
<tr>
<td><strong>Core Concept</strong></td>
</tr>
<tr>
<td>➢ Meetings put a face on mental illness and build relationships and support for our issues</td>
</tr>
</tbody>
</table>

**As we mentioned in our agenda,** we'll begin by talking about why in-person meetings with your policymakers is important.

It’s helpful to remember that politics are personal. Meeting with your policymakers gives you the face-to-face interactions that build relationships and help advance your goals. Lobbyists will tell you that meetings are vital to putting a face on mental illness and building support for our issues.

Elected officials are faced with many competing issues and interest groups. Your personal relationship—and a well-crafted message—can make the difference in a policymakers’ attention to and support of mental health issues.
<table>
<thead>
<tr>
<th>In-person meetings…</th>
<th>While having an issue or issues is important for the focus of the meeting, the primary goal of an in-person meeting with your policymaker is to make a connection. Building a relationship is far more important than powering through a number of people, issues or points. This applies to a meeting with a legislative assistant, or staffer, as well. While many people are disappointed not to meet with their elected official, don’t be. A staffer is often a highly trusted source for your elected official. Treat staff with respect. Developing a relationship with a staff person can be invaluable in getting your message across and advancing your goals.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help you make a connection</td>
<td>While our goal is to make a connection, we would like our meetings to make as strong an impression as possible. Think about an effective meeting you’ve been part of, particularly if with a policymaker. In one word, can you describe a characteristic that adds to a meeting’s effectiveness? A characteristic that can lead to a disappointing meeting? [Take two or three responses to each question. Paraphrase what you heard. Ask participants to keep these thoughts in mind during the training.]</td>
</tr>
</tbody>
</table>
We’re at the second part of our agenda. A few tips for meeting with your policymaker.

The first tip may seem obvious. It is to **know your issue**. Your policymaker will expect you to be meeting with him or her about an issue—not just to chat.

Having clarity about your issue and your “ask”—what position or action you want your policymaker to take—is essential to having an effective meeting.

The second tip is to **know your policymaker**. You can build a stronger connection (and a more targeted message) by knowing and understanding your elected official.

Knowing your policymaker can help you choose what you say and how you say it—and may help you choose who to bring to a meeting with you.

Later in the training, we will provide some useful tools that will help you to know your policymaker and to articulate your issue.
Our third tip is to **plan your meeting**. Meeting with your policymaker can be intimidating. Planning will help you feel more confident.

There is another reason to plan. You may find yourself in a group meeting with a policymaker. Group meetings are more complicated than a one-on-one meeting.

The more people in a group, the more complicated the “flow” and the greater the chance of people going “off message.”

And, there is even less time for your advocacy message in a group meeting.

Fortunately, the solution is simple. **Prepare.**

Today, you'll learn a few basic steps to planning a good group meeting and some basic components. It's like a recipe. Once you're familiar with your ingredients, the components, and with the directions, or steps, you'll find it easy to improvise and expand.

Bear in mind that if you are not planning on a one-on-one meeting with your policymaker, then going to a meeting as a pair is often more effective than a group of three visitors. With a pair, the policymaker forms the third leg of a “triangle.” This arrangement encourages productive dialogue.

For a different effect, a group of five or six makes a strong impression.
### Tip #4
**Nudge, don't push.**

This is important. By this, we mean you do not need to convert your policymaker to our cause to make a difference. If you try, you will probably alienate your policymaker.

You can change the outcome of votes by *gently shifting* a policymaker's opinion in a positive direction.

By forming a positive relationship, you can help:
- Shift a policymaker who is adamantly opposed to mental health issues to someone who is opposed, but not strongly negative;
- Shift a policymaker who is opposed to being “on the fence,” or fairly neutral;
- Or, a policymaker who is neutral may become supportive;
- And a policymaker who is favorable may become a legislative champion of mental health issues.

This is a nice tip because it takes some of the pressure off. You don’t have to convince your policymaker, just keep building a connection.

### Tip #5
**Use person-first language.**

Language that emphasizes the person, rather than the illness, helps listeners empathize. That’s why it’s helpful to regularly say “person or persons living with mental illness,” rather than “the mentally ill” or “these people,” which marginalize individuals who are living with diagnoses.

It is also very helpful to *focus on positive concepts, like recovery*, rather than language that evokes pity, like “suffering.”

This can seem counter-intuitive. Advocates often think that by describing people as “suffering with mental illness,” they will be helping policymakers see that they need to fund services.

The reality is very different. **Policymakers fund success stories.**

Describing hope, recovery, or, for example, the difference supportive housing has made in the life of someone living with severe mental illness, is critical to increasing support for mental health issues.
Tip #6 is to **manage spin**. Policymakers will naturally move the conversation in a direction that is more comfortable or familiar for them.

This can take many forms:

- Asking a personal question;
- Focusing on costs, data, another issue or something other than people living with mental illness;
- Asking how you’d solve a legislative problem or what choices you would make;
- Making a comment about mental illness that reflects their perspective;
- Asking your opinion on a “hot” topic, like taxes.

**[Option: Give a brief example.]**

Don’t get trapped. **Stay focused.** Bring the conversation back around to where it belongs: on people living with mental illness.

Tip #7 is to **expect resistance**. Our primary advice is **don’t argue**. As we mentioned earlier, you don’t have to convince policymakers who have concerns or are unsupportive of our issues.

Often, policymakers who are unconvinced request more facts. This is intended to put you on the defensive. Don’t fall for it. **You do not need to have all the answers.**

In your response, acknowledge your policymaker’s concern and then make a positive point about your issue.

Shift the focus back where it belongs. Emphasize person-first language and focus on positive concepts, like recovery.

**[Note: Basic Strategies for Shaping the Dialogue is included in participants’ worksheets. This is a useful resource that covers several of our tips and gives examples.]**
| Tip #8                           | Our last tip is that **facts support, stories move**. If you've taken the Telling Your Story training, you'll recall that contrary to what many people think, it is not facts that change people's minds. They play a back-up role—they support the appeal of real people.

And, they are often used by policymakers to help convince their fellow elected officials.

Facts are most useful when they are in written form, while stories and emotion are most powerful when spoken.

You do not need to be a walking encyclopedia. One way to use facts well is to provide your policymaker a **NAMI fact sheet** after your meeting. This is particularly useful if you don't find facts easy to remember.

Another way is to weave brief facts into your talking points or your story or in a thank you note. To find facts, use one of **NAMI's fact sheets** (page 27). Or, use the **Finding Facts (page 28) sheet** in your packet for more sources. You don't need many facts—stick to one to three that you can easily remember.

You've just heard a lot of information. **What tips made a strong impression on you and why?** [Take two to three responses.] |
| --- | --- |
We’re now moving into the third part of our agenda—demonstrating a two-on-one meeting with a policymaker.

While you listen, notice the roles the two constituents play and where you hear our tips in action. Also listen for how both facts and a story highlight are woven in.

Demonstrate a meeting using the Meeting Your Policymaker script (pages 1-3). [You will need two helpers who have practiced or read through the script.]

Did you notice how much was conveyed in just a few short minutes? [Take one or two responses. Give time for participants to take in what they noticed.]

What did you notice about the roles people played and the flow? [Take one or two responses.]

Did you notice the policymaker spinning the conversation in a different direction? What did you note about the response? [Take a response, then ask for another example. Reflect back what you heard.]
| Slide 16 | **Approx. 2 min**  
**Total time: 38 min**  
**Core Concepts**  
- Checklist has five major parts  
- Prep section repeats tips |

Find your **Checklist for Meeting a Policymaker (pages 4-6)** and you may want to look at your copy of the demo for reference. This checklist should look familiar. It has similar elements to checklists in Telling Your Story and Emails and Phone Calls. The checklist breaks down the steps of meeting a policymaker.

However, because meetings are more complex than sharing your story or writing, there are more elements in this checklist.

Notice that the checklist has five major parts: Prep, Mtg Stage 1: Make a Connection, Mtg Stage 2: Deliver your Message, Mtg Stage 3: Close on a Positive Note, and Follow Up.

1. I'll touch on the **Prep** section briefly. This section repeats most of the tips you heard earlier today so we won't review them. Note that your handouts include Basic Strategies for Shaping the Dialogue, which provides additional information on some of the tips.

**Worksheet: Checklist for Meeting Your Policymaker**

**Helper:** Help people find worksheet as needed
<table>
<thead>
<tr>
<th>Slide 16</th>
<th><strong>Approx. 3 min</strong></th>
<th><strong>Total time: 41 min</strong></th>
</tr>
</thead>
</table>
| **Core Concepts** | 2. The next section is **Meeting Stage 1: Make a Connection**. This includes two elements that we use consistently—introducing ourselves and stating our issue and position, which helps clarify the reason for the meeting.  
  
The new element is to **show appreciation**. This should include thanking your policymaker for taking their valuable time to meet with you.  
  
Think about the name of this stage, “Make a Connection.” First impressions make a big difference in building a relationship. To facilitate that relationship-building, touch on a shared interest or connection or talk about something positive your policymaker has done.  
  
This lets your policymaker know that you appreciate them or have taken the time to learn something about them. This sets a helpful tone.  
  
Worksheet: Checklist for Meeting Your Policymaker  
  
**Worksheet: Checklist for Meeting Your Policymaker**  
  
Take a moment to find the lines in the demo that are used to build a connection.  
  
**Where did you hear John and Jenny building a connection? What did you notice about this?**  
  
[Pick a volunteer or two to share the lines they marked and their comment.]  
  
While building a connection is important, it’s important to keep the meeting focused. Find where the issue and position are stated in the demo.  
  
**Where did you hear John talking about the issue and position? How did this help keep the meeting focused?**  
  
[Pick a volunteer to share the line they marked and their comment.]
3. The next major section of your checklist is **Meeting Stage 2: Deliver your Message**. This is the longest section, but the elements should look familiar. It contains the same elements that you combine in Telling Your Story or Emails and Phone Calls—describing the need or problem, adding talking points, sharing your story, proposing a solution and making an “ask.”

The difference is that in a meeting, these elements will be part of a conversation—and more than one individual may be covering these elements.

We’ll review each of these elements briefly.

First, **describe the need or problem** that your issue addresses. It’s common to skip this step because the need or problem may seem obvious. For busy policymakers, it may not be.

By making the need or problem faced by people living with mental illness explicit, you help policymakers understand the need for a solution.

It’s also common to over-describe a need or problem. Policymakers do not want a lengthy discourse. The longer your description, the more it will appear to be unsolvable. Keep your description boiled down to a simple and understandable sentence or two.

**Worksheet: Checklist for Meeting Your Policymaker**

Take a moment to find the description of the problem in your demo. **What do you note about the simplicity of this statement of the problem?**

[Ask a volunteer to share the line in the demo and comment.]
### Core Concepts

- Second step in deliver your message stage is to make your talking points.
- Talking points may be basic facts or support the need or solution or address impact of issue.

<table>
<thead>
<tr>
<th>4. The second step in Meeting Stage 2 is to make your talking points. These should address the impact of the issue or bill or support either the need or problem or the solution.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talking points can include data, but don’t have to.</td>
</tr>
<tr>
<td>Ideally, your NAMI State Organization or coalition will develop a clear set of talking points for your issue. If not, develop your own set that you can remember and bring up at appropriate moments in a meeting.</td>
</tr>
<tr>
<td>Remember, you do not need to know a lot about policy or the issue to develop talking points. Basic facts about how common mental illness is and the need for services and supports make excellent points that support your issue. You can get these from our fact sheets or use the Finding Facts guide to find more.</td>
</tr>
<tr>
<td>Lastly, note that talking points can be woven at various points in a meeting. Today, we’ll practice with talking points coming after the description of the need or problem.</td>
</tr>
</tbody>
</table>

**Worksheet: Checklist for Meeting Your Policymaker**

- In the demo, talking points are used at two different points.

  **Where did you hear talking points and which one(s) struck you?**

  [Ask a couple of volunteers to share their favorite talking points.]
5. The third step in the delivering your message stage is to tell your story.

In the context of a meeting, your story should be very brief—just a few lines that touch on the highlights of your story and that bring a human face to the issue being discussed.

This is where you can use highlights from your story you developed in the Telling Your Story training or in Emails and Phone Calls.

As we mention in the Telling Your Story training, focusing on what helped or what would have helped and emphasizing recovery or hope is helpful to gaining empathy.

Telling your story briefly in a meeting can leave a powerful impression and plays a pivotal role in moving or shifting the perceptions of policymakers.

Take a moment to find where Jenny shares her story in the demo. What struck you about the story and its impact? What line caught your attention?  
[Ask a volunteer or two to comment and share a line.]
### Core Concepts
- Fourth and fifth steps in delivering your message stage are to describe what will help and make an “ask.”
- What will help and “ask” should seem very natural to those who have taken Telling Your Story or Emails and Phone Calls. While these are a vital part of a successful meeting, they are often overlooked or overstated.
- The solution or what will help should be stated simply. In our demo, what will help is accompanied by a couple of talking points that help support the solution.
- The solution is followed by the “ask,” or what action or position you would like your policymaker to take on your issue. The “ask” should be as specific as possible. This is necessary in order to get a response that lets you know if you can count on your policymaker or not.
- After the “ask” is a natural point to draw your meeting to a close. If you have another issue or two that you’d like to discuss and have time, you may repeat the stage 2 process to deliver your message(s) before closing the meeting.

### Worksheet: Checklist for Meeting Your Policymaker

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Take a moment to find what will help others and the “ask” in the demo.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Why is the solution and “ask” important to a meeting with your policymaker?</strong></td>
<td></td>
</tr>
<tr>
<td>[Ask a volunteer or two to comment.]</td>
<td></td>
</tr>
</tbody>
</table>
7. The third stage of your meeting is **Close on a positive note**. This includes saying thank you, but also includes some options for furthering your relationship. Like the opening of a meeting, it is an important time to develop a positive connection.

One option that helps close on a positive note is to **provide information**. A fact sheet on your issue or a general fact sheet on mental illness is an excellent “leave-behind” for your policymaker. Another leave-behind that is useful is a folder with information on your organization’s legislative priorities.

To get the most mileage from your leave-behinds, write the bill number for your lead issue across the top. This will ensure that your materials are filed with the “bill file” and don’t go in the “round file,” or recycling bin.

Also, consider providing a business card or brochure for your organization. This gives your policymaker an easy way to record your contact information and to recognize that you serve a valuable role in the community.

Another option is to **offer to be a resource** on mental health issues or support to constituents who need help navigating the mental health system, you are providing support to the policymaker. This is a gesture of reciprocity that helps develop your relationship.

A very helpful option is to **make a request or extend an invitation**. Policymakers and their staff are anxious for ways to get exposure with their constituents. Having their picture taken for your newsletter or inviting them to the next NAMIWalk or a local mental health program or IOOV presentation gives your policymaker valuable time in public. If you use a picture of your policymaker in your newsletter, be sure to forward a copy to him/her.

They will appreciate the opportunity. And you will get an opportunity to let them know how important mental health issues are to you.
Take a moment to find **Close on a positive note** stage of the demo.

*What did you take away from this stage of the meeting?*

[Ask a couple of volunteers to comment.]

*How did you think this checklist will help you?*

[Ask a couple of volunteers to comment.]
Next, we'll explore a few tools that will help you easily prepare for meeting your policymaker.

Because meetings with policymakers are usually brief, you'll need to prioritize your top one to three issues in order to make a strong impact—and you'll need to quickly summarize your key messages on each issue.

The first tool is **The Briefing Sheet (page 7)**.

Find your Briefing Sheet and take a moment to quietly review it.

[Give participants about half a minute to review.]

**What strikes you as helpful about this briefing sheet?**

[Take a quick response or two.]

A briefing sheet organizes information about your issue in a way that will help you remember your “ask” and how you will describe the problem or need, key talking points and the solution.

The briefing sheet also gives you a place to identify a bill’s sponsors and/or committee(s) the bill is in or will be heard in. Often, policymakers will ask for this information.

A briefing sheet can be helpful in preparing you to discuss an issue concisely. You can prepare your own or, preferably, work with your organization to develop one. Use a separate briefing sheet for each issue if you intend to cover two or three issues. A template is included in your packet.
Our tips and your Checklist for Meeting your Policymaker mention "Know your policymaker" as a prep item. The Backgrounder (page 8), like the briefing sheet, is a tool to help.

As you heard in the demo, you can help build a connection and target your talking points by knowing and understanding your elected official.

A backgrounder helps by providing valuable information, such as how long your elected official has been in office, their career and personal background, committee assignments and their key issues or positions.

The sample backgrounder is on a fictitious Senator David Walker. His information helped shape the demo you heard a bit ago.

Take a moment to review The Backgrounder.

[Give participants about half a minute to review.]

What do you notice in Senator Walker's background that you heard used in our demo as a way to build the connection? [Take a few responses. Reflect back what you heard.]

Where do you notice a potential concern in The Backgrounder that showed up in the demo? [Take a response or two. Reflect back what you heard.]

How might a Backgrounder be useful to you? [Take one to three responses.]

It's easy to find the information you need to know your policymaker's background and make a backgrounder. Two primary sources are NAMI's Legislative Action Center or the website of your state legislature.

A template with how-to's for finding information is included in your packet.

With a briefing sheet and backgrounder, you have the information you need to know your issue and know your policymaker. Along with your Checklist, you’re ready to plan a meeting.
Approx. 5 min  
Core Concepts
- There are three main meeting roles: lead, messenger and storyteller.
- In a one-on-one meeting, one constituent fills all three roles.
- In a two-on-one meeting, one constituent fills two roles, the other fills one role.

Let's discuss Meeting Roles (page 9), your next tool. In group meetings with a policymaker, there are generally three roles that we call the "lead," the "messenger" and the "storyteller."

In a one-on-one meeting, you take on all roles.

In a two-on-one meeting with a policymaker, one person will take on two roles while the other person takes on one role. Or, you can divide up one of the roles. In our demo, we showed how a two-on-one meeting can look.

If you have a three-on-one meeting with a policymaker, each person will take on one of the roles. In larger meetings, it is more effective if additional participants serve as valuable "eyes and ears" during the meeting.

If two or more issues will be discussed, however, other participants may take on roles as messengers or storytellers.

Take a moment to review your Meeting Roles sheet. [Give about half a minute to review.]

When you are taking part in a group meeting, consider dividing up roles based on each person’s strengths. A person who has a relevant story and is able to present it concisely may be the best fit for the storyteller role. Other skills may be best suited for the lead role or messenger role.

What kind of skills or characteristics might be needed in each of the roles? [Take a quick response or two.]

How can thinking about roles help you plan an effective meeting? [Take a quick response or two.]

Before we move on, note that these roles are a “basic recipe” that will help you plan a group meeting. As long as there is agreement beforehand, roles can be modified to suit individual strengths or preferences.
With these tools, it’s time to plan your own practice meeting. Find your six-page Meeting Script (pages 10-15). Take a moment to look it over.

[Give participants about half a minute to review.]

Notice that Your Meeting Script is divided into the three stages from your checklist.

The first stage, Make a Connection, is simple, but it sets the tone for a thoughtful meeting. In a group meeting, the lead is the major speaker.

The second stage, Deliver your Message, focuses on the message. The lead person typically initiates the discussion, with the storyteller (and sometimes messenger) adding talking points and a story or personal perspective. This stage also includes the "ask," or request of an elected official.

If you have more than one issue, repeat the second stage of the meeting for each issue. You can prep for this by filling out a briefing sheet and script for each issue.

The third stage is to close on a positive note. This should focus on leaving a fact sheet or legislative packet, thanking the elected official for his or her time and other ways to keep the connection.

To manage our time, the script already includes most of what you will say during our practice session. But, notice that there are some areas that request you to fill in information indicated by brackets.

Over the next 20 minutes, assume that you will be taking on all three roles in a one-on-one meeting using the issue in The Briefing Sheet.

Focus on the introduction, showing appreciation, talking points and telling your story sections of your script.

Borrow from the briefing sheet and backgrounder, your fact sheet and other materials as you work. Remember that briefer is often better.

Warn participants when 10 min left, then when 5 min left.

[Let participants know that if they finish early, they can revise optional areas of the script or silently run through their script.]
And now, it’s time to practice. Find a partner. If there is one person left over, one group should practice as a group of three.

One person in each group will take on the role of Sen. Walker. After practicing a meeting, you’ll switch roles.

Before you begin, take out a copy of the fact sheet (page 27) to use as a prop and your six-sheet Meeting Script (pages 10-15).

If you have time after practicing, the person playing the policymaker should briefly discuss what was effective and what would help make an even stronger impact. Provide helpful, constructive feedback that gives specific information about what worked—and what could be improved and how.

We’ll take 5 min. for the first round, then I’ll remind you to switch roles and practice another meeting.

Ask participants to switch roles after 5 min.

Stop participants after 10 min.

What surprised you the most or helped you the most in your practice meeting with a policymaker? [Take a couple quick responses.]

Would anyone like to suggest someone who had a strong story component or talking points? [Ask the person identified if they are willing to share their story component or talking points. Take one or two volunteers.]
### Core Concept
- Plan out roles and script for a two-on-one meeting with a partner
- Take 5 min to plan roles

### Optional Section:
Now that you’ve practiced a one-on-one meeting, it’s time to practice a more complicated scenario—a **two-on-one meeting**.

**Over the next 5 min, divide up the three meeting roles** with your current partner (neither of you will play the role of the Senator). One of you will take on two roles or you may divide up the Messenger role parts.

**Mark your own script to indicate what roles and remarks you will make in a group meeting.**

If time, consider making edits to your script to reflect the constructive feedback you received earlier.

**Stop participants after 5 min.**

### Helper and Teacher:
Circulate and assist people in marking their roles and script
Optional Section: With your partner, find another pair nearby to work with (there may be one trio and pair).

When you’re in your groups, let me know. [Wait until people are in groups to proceed.]

Make sure you have your newly marked Meeting Scripts (pages 10-15) and a fact sheet (page 27) to use as a prop. We will also be using another worksheet, the Constructive Feedback Form for Two-On-One Meeting (page 16).

In your new groups, one pair (or trio) will take on the roles of constituents in a two-on-one meeting.

The other pair (or trio) will play the roles of the Senator and his or her staff. One person should read the script lines for Senator Walker. The remaining person(s) should prepare to provide constructive feedback.

Look at your Constructive Feedback Form for Two-On-One Meeting (page 16). You’ll notice that this form does not cover all aspects of a meeting with a policymaker, but it does capture some of the key areas you are practicing.

The form has a scale, from one to five, with a one indicating an area that could be strengthened, three indicating an area that is works fine and a five indicating an area that is particularly strong or impactful. Participants who are observing the meeting as staff should use the scales to quickly record impressions. Also, use the space below the scales to jot notes about what specifically came across as strong or recommendations for how to strengthen an area.

If you have time after practicing, the people playing staff roles should briefly provide specific comments on what was effective and what would help make an even stronger impact.

We’ll take 5 min. for the first round and then I’ll remind you to switch roles and practice another meeting.

Ask participants to switch roles after 5 min.
Stop participants after 10 min.
Optional Section: Please return to your original seats now.

*What did you take away from your two-on-one meeting with a policymaker?*  [Take two or three responses.]

*Would anyone like to suggest someone who had a strong story component or talking points?*  [Ask the person identified if they are willing to share their story component or talking points. Take one or two volunteers.]

*What was effective about the part you just heard?*  [Take two or three responses.]
**Optional Section:** You just learned how to meet with your policymaker and practiced very important skills. But, never underestimate the power of following up. This is true in many life circumstances—and politics is no exception.

Following up is routinely overlooked. This is unfortunate, as following up is not only polite, it leaves a positive impression and gives you another chance to advocate your issue.

Take a quick look at the Sample Thank You Note (page 17) in your packets. As you can see, a thank you note gives you an opportunity to remind your policymaker that you met with him or her and another opportunity to make your “ask.” You can even add a fact or detail that you forgot during your meeting or were able to research later.

There are even more benefits to a thank you. Your thank you will impact more than one person. Here’s why: A receptionist or staff usually opens the mail. They deal with many invitations and requests, complaints, lobbying pieces, and very long letters. A short thank you note is a pleasing change of pace.

You have just made a positive impression with a very important person—your policymaker’s receptionist or aide. It is staff who often manages your policymaker's schedule and who will convey their opinion of you (and your issue) to your policymaker. They will lay the note out for the policymaker to read.

And, your thank you note will get filed by a bill number if you mentioned one. The policymaker will look at his or her bill file before a vote. The correspondence and fact sheets in the file will remind the policymaker of the issue and of the opinions of his or her constituents.

See how much goodwill a simple note can generate and how powerful it can be?
Congratulations!

What did you discover today?

**Core Concepts**

- Thank you notes are powerful follow up
- Thank you leaves a positive impression with staff and policymaker

Approx. 5 min

Total time: 1 hr. 55 min

Or

Total time: 2 hr. 25 min

**What did you take away from this experience today?**

Do you feel more prepared to meet with your policymaker? Why?

What was most helpful or impactful for you?

[Take a few responses to each question.]

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.

Please remember to fill out your post-training evaluation and turn it in to (name location or person).

Worksheet: Pre- and Post-Training Evaluation

Helper or Teacher:

- Assist in collecting evaluations
INSERT TAB: Module 3 worksheets
Demo: Meeting Your Policymaker
(Two Constituents)

Meeting Stage 1: Make a connection

**Introductions**

**Senator Walker:** “Good morning, everyone. Thank you for coming.”

**John (Lead):** (shakes hand) “Hello, Senator. I’m John Adams from Spring Valley. We’re members of NAMI Springville, part of America’s largest grassroots mental health organization, the National Alliance on Mental Illness.

We really appreciate your taking the time to meet with us—we know you’re very busy.”

**Jenny (Storyteller):** (shakes hand) "It’s a pleasure to meet you, Senator. I’m Jenny Jones from Springville."

**Senator Walker:** “It’s a pleasure to have you here. I know NAMI; you’ve always done a great job bringing up mental health issues."

**Show appreciation**

**John (Lead):** "Senator Walker, before we talk about some important issues affecting your constituents who live with mental illness, we’d like you to know that we appreciate your many years of service in our legislature."

**Senator Walker:** “Thank you, I’ve spent twelve years in public office, now."

**Jenny (Storyteller):** "We also appreciate that, as a doctor, you value the health of your constituents and have provided important leadership on the Medicaid Health Plan and health care issues in our state."

**Senator Walker:** “Well, I’ve seen too many people in emergency rooms with issues that could have been prevented for pennies, including a lot of people who needed mental health care.”

**Issue and position**

**John (Lead):** "I’m glad you mentioned that, Senator. We’re here because we want to urge you to support mental health services in HB 39, the mental health budget."
Meeting Stage 2: Deliver your message

The need or problem

John (Lead): “More families than ever are seeking help from our mental health centers. But with budget cuts, people can’t get the mental health services they need.”

Senator Walker: “I’ve always been a supporter of mental health; I was a co-sponsor on NAMI’s parity bill. But, it’s going to be an extremely tight budget this year. There are serious revenue shortfalls and we’re still figuring out where we can find savings. We’ve got to get spending under control.”

Talking points

John (Lead): “We understand, Senator. It’s going to be challenging, but the people of our state deserve the opportunity to be productive and healthy. To have that opportunity, they need access to mental health care.

Also, if we don’t protect mental health services, it’s going to cost us more in other places.

When our children can’t get help for mental health conditions, they fall behind in school and families struggle.

When adults can’t get treatment, costs shift to jails, emergency rooms and hospitals.”

Senator Walker: “Isn’t that the truth. Like that kid involved in that police shooting—they’re saying he has a mental illness. I can’t believe those parents of his didn’t do something before a tragedy happened.”

Story

Jenny (Storyteller): “Yes, there’s a lot of speculation around that. I just wish the media would talk about stories of recovery, like mine, instead of focusing on sensational news.

I’m here because my life is affected by mental illness. My son, Andy, lives with bipolar disorder and I can tell you that treatment can make the difference between despair and recovery. Today, Andy’s living on his own, working as an artist and making me proud. I never thought I’d see him experience this kind of recovery.

But, it wasn’t always that way. Before he got the treatment he needs, I saw him in the back of police cars and held him in my arms after a suicide attempt. No child should have to go through this.”

Senator Walker: “I really appreciate your story, Jenny, and I’m so happy to hear your son is doing well. Is Andy showing his art anywhere?”

Talking points

Jenny (Storyteller): “Yes, a gallery is representing him. But, what I’m worried about is that there are thousands of others in our state just like my son, except most don’t get the help they need.”
More than one in ten youth and about one in seventeen adults lives with a serious mental illness, so it’s more common than most people think. Many of our returning service men and women are experiencing mental illness, too.”

**What will help others**

**Jenny (Storyteller):** “We need more mental health services, not fewer. It’s an investment in health and productivity. If people can get the right care at the right time, they can be successful, like my son.”

**The “ask”**

**John (Lead):** “The people of our state need your vote to protect mental health care. Can we count on your support of HB 39, Senator?”

**Senator Walker (standing):** “You’ve both made some excellent points and I’ll keep them in mind. I know how important mental health services are and I’ll think about this as we’re working on the budget.”

**Meeting Stage 3: Close on a positive note**

**Say thank you**

**John (Lead):** (shakes hand) “Thank you so much, Senator Walker. We appreciate you taking the time to hear about our issues.”

**Provide information**

**Jenny (Storyteller):** "Thank you for meeting with us, Senator. We know your time is limited, so we’d like to leave you with this packet that contains a fact sheet and NAMI’s other legislative priorities. We hope we can count on your support for them.”

**Offer to be a resource**

**John (Lead):** “Please know that we’d welcome the opportunity to be a resource to you in the future. We’d also like to follow up and see how you intend to vote on our issues.”

**Senator Walker: **"Certainly. Please give my staff your contact information before you leave so they can get hold of you.”

**Make a request**

**Jenny (Storyteller):** (shakes hand) “Thank you, Senator. If you have time, we would be honored if you would have your picture taken with us for our newsletter.”

**Senator Walker:** "I think I can take a moment for a picture. And please tell Andy "hello" for me, will you?"

**Jenny (Storyteller):** "Of course, Senator. Thank you. That will make his day.”
# Checklist for Meeting Your Policymaker

## Prep for success

<table>
<thead>
<tr>
<th><strong>Know your issue.</strong> Identify your issue, describe the problem, your talking points, your story, the solution and your “ask.” Use a briefing sheet to organize info.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Know your policymaker.</strong> Read your policymaker’s bio and press releases or newsletter. Find out what committees they are on and their interests.</td>
</tr>
<tr>
<td><strong>Plan your meeting.</strong> If meeting as part of a group, identify roles and coordinate what you will say. A group of two is often the most effective.</td>
</tr>
<tr>
<td><strong>Use person-first language.</strong> Emphasize the person, not the illness (e.g., person living with schizophrenia). Avoid negative terms like “suffering.” Use positive concepts, like recovery, to promote empathy.</td>
</tr>
<tr>
<td><strong>Manage spin.</strong> Don’t get caught up in side issues. Practice bringing the focus back to where it belongs—on people living with mental illness.</td>
</tr>
<tr>
<td><strong>Expect resistance.</strong> Don’t argue. Anticipate challenging comments and questions and practice positive responses. Use facts to support your statements, if possible.</td>
</tr>
</tbody>
</table>

## Stage 1 of Meeting: Make a connection

<table>
<thead>
<tr>
<th>✓ <strong>Introduce yourself</strong></th>
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</thead>
<tbody>
<tr>
<td><strong>Address your policymaker by their elected title.</strong> Add their last name, if you like.</td>
</tr>
<tr>
<td><strong>Give your name and city or town.</strong> Include your organization. We encourage you to describe yourself as “a member of [NAMI State Org or NAMI Affiliate], part of America’s largest grassroots mental health organization, the National Alliance on Mental Illness.”</td>
</tr>
<tr>
<td>✓ <strong>Show appreciation</strong></td>
</tr>
<tr>
<td><strong>Thank your policymaker for his or her time.</strong></td>
</tr>
<tr>
<td><strong>Option: Mention something positive your policymaker has done.</strong> This can be his or her length of service, leadership on an issue or a previous vote, for example.</td>
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<tr>
<td><strong>Option: Touch on a shared interest or connection.</strong></td>
</tr>
<tr>
<td>✓ <strong>State your issue and position</strong></td>
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<tr>
<td><strong>Describe your issue.</strong> Indicate the position or action you would like your policymaker to take.</td>
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</table>
## Stage 2 of Meeting: Deliver your message

| ✓ | What is the need or problem? |
|   | **Mention the problem or need you want addressed.** Transition to the challenge(s) faced by people living with mental illness. |

| ✓ | Add talking points |
|   | **Make your points.** Talk concisely about the impact of the issue or bill and/or why the bill is needed. |

| ✓ | Tell your story |
|   | **Share your story.** Describe how you are affected by mental illness. Briefly add highlights of your story that are relevant to the issue. |

| ✓ | What will help others? |
|   | **Propose a solution.** Let your policymaker know what will help address the need or problem you described. |

| ✓ | Make your “ask” |
|   | **Ask your policymaker if you can count on their support (or opposition).** Be specific about the action or position you want them to take. Include a bill number, if possible. |

| ✓ | Optional: Repeat for additional issues |
|   | **Describe your next issue.** Repeat the process of giving talking points, describing the need or problem, the solution and your “ask.” Focus on no more than three issues in a meeting. |

## Stage 3 of Meeting: Close on a positive note

| ✓ | Say thank you |
|   | **Thank your policymaker.** Let your policymaker know you appreciate their time and attention. |

| ✓ | Optional: Provide information |
|   | **Leave a fact sheet.** If possible, provide a fact sheet, legislative packet or summary of your issue(s) or bill(s). Ask for support on your other issues, if applicable. Also, provide information on your organization and its programs. |

<p>| ✓ | Optional: Offer to be a resource |
|   | <strong>Be helpful.</strong> Let your policymaker know you are willing to serve as a resource on mental health issues. |</p>
<table>
<thead>
<tr>
<th>Optional: Make a request</th>
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<tbody>
<tr>
<td><strong>Request a picture or extend an invitation.</strong> Ask your policymaker to pose for a group photo or ask him/her to visit a local program or event, like the NAMI Walk.</td>
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<tr>
<th>Follow up</th>
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<tbody>
<tr>
<td><strong>Send a thank you note.</strong> A hand-written thank you note is not only polite, it will leave a positive impression and allows you to <em>repeat your ask.</em></td>
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<tbody>
<tr>
<td><strong>Check back regarding position.</strong> Write, call or email a polite inquiry a week or two after your meeting.</td>
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<table>
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<tr>
<th>If applicable: Follow through on a request.</th>
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<tbody>
<tr>
<td>If your policymaker asks for addition information, follow up immediately. If you do not have the answer, ask NAMI or your NAMI State Organization for assistance.</td>
</tr>
</tbody>
</table>
The Briefing Sheet

A "briefing sheet" is a tool to prep for meetings with policymakers; it is not appropriate to leave behind. Provide elected officials or staff with separate fact sheets or materials outlining legislative priorities.

<table>
<thead>
<tr>
<th>The issue</th>
<th>The “ask”</th>
<th>The need or problem, talking points and solution</th>
<th>Committee and sponsors</th>
</tr>
</thead>
</table>
| **House Bill 39** (mental health budget) | Vote to protect mental health services in HB 39 | **The need or problem:** More individuals and families than ever are seeking help from our mental health centers. But with budget cuts, people can’t get the mental health services they need. | **Joint Ways & Means Committee**  
Co-Chair Sen. Johnson  
Co-Chair Rep. Mark |
|                                  |                                                | **Talking Points:**  
- People deserve the opportunity to be productive and healthy. To have that opportunity, they need access to care.  
- When children can’t get help for mental health conditions, they often fall behind in school and families struggle.  
- When adults can’t get treatment, costs shift to jails, emergency rooms and hospitals.  
- More than one in ten youth and about one in seventeen adults live with a serious mental illness, so it’s common.  
- Thousands of men and women who’ve served our country experience mental illness.  
- When people get the right care at the right time, they can be successful and experience recovery.  
- Mental health care is an investment in health and productivity. | **Human Services Subcommittee**  
Co-Chair Sen. Greenly  
Co-Chair Rep Henry  
No sponsor—agency budget bill |
|                                  |                                                | **The solution (what will help):** Preserving mental health funding will ensure that mental health services are there when people need them. |                                                             |
# The Backgrounder

<table>
<thead>
<tr>
<th>Elected official</th>
<th>Committee assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Senator David Walker, M.D.</strong>&lt;br&gt;D-Spring Valley&lt;br&gt;First elected to Senate in 2004&lt;br&gt;Deputy Majority Leader</td>
<td><strong>Ways &amp; Means</strong>&lt;br&gt;Co-Chair, Ways &amp; Means Subcommittee on Human Services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact info</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>900 Court St NE, S-205&lt;br&gt;Salem, OR 97301&lt;br&gt;Phone (503) 555-5555&lt;br&gt;Email <a href="mailto:sen.dwalker@somewhere.state.us">sen.dwalker@somewhere.state.us</a>&lt;br&gt;Website <a href="http://www.walker4ever.com">www.walker4ever.com</a></td>
<td>• Strong proponent of expansion of health care coverage&lt;br&gt;• Concerned about reigning in health care costs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal info</th>
<th>Bio</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Marital Status:</strong> Married to April&lt;br&gt;<strong>Residence:</strong> Spring Valley, Oregon&lt;br&gt;<strong>Occupation:</strong> Doctor&lt;br&gt;<strong>Previous Political Experience:</strong> Oregon House of Representatives, 2000-2004&lt;br&gt;<strong>Education:</strong> BA, Oregon State University, 1969&lt;br&gt;DO, College of Medicine, Richmond, Virginia, 1973&lt;br&gt;<strong>Birthdate:</strong> August 2, 1946&lt;br&gt;<strong>Religion:</strong> Protestant</td>
<td>• Enlisted in the US Army and served one tour of duty in Vietnam&lt;br&gt;• Attended medical school at the College of Medicine&lt;br&gt;• In private practice in rural Spring Valley for the last 30 years&lt;br&gt;• Former Chief of Medicine at Deep Valley Medical Center&lt;br&gt;• Served three terms on the Spring Valley School Board&lt;br&gt;• Governor's Quality in Education Task Force&lt;br&gt;• Appointed to the Health Services Commission in 1989, which was instrumental in designing the Oregon Health Plan.</td>
</tr>
</tbody>
</table>

Where do you see potential areas of connection or shared interest?

Do you see or know of any potential concerns or areas of resistance to your issue?
Meeting Roles

Before your group meeting, determine what role each participant will play. Note: Role descriptions are suggestions; refer to your Meeting Your Policymaker checklist and make sure a participant is identified for each part you expect to cover.

<table>
<thead>
<tr>
<th>Role descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lead</strong></td>
</tr>
<tr>
<td>- Introduces self or the group</td>
</tr>
<tr>
<td>- Introduces issue and position</td>
</tr>
<tr>
<td>- Makes the &quot;ask&quot;</td>
</tr>
<tr>
<td>- Closes the meeting</td>
</tr>
<tr>
<td><strong>Messenger</strong></td>
</tr>
<tr>
<td>- Gives talking points</td>
</tr>
<tr>
<td>- Describes the need or problem</td>
</tr>
<tr>
<td>- Describes the solution</td>
</tr>
<tr>
<td>- Gives legislative packet at meeting close</td>
</tr>
<tr>
<td><strong>Storyteller</strong></td>
</tr>
<tr>
<td>- Adds highlights of personal story or local perspective of issue's impact</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Size of meeting</th>
<th>Division of roles</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>One-on-one meeting</strong></td>
<td>You will take on all three roles above.</td>
</tr>
<tr>
<td><strong>Two-on-one meeting</strong></td>
<td>One person in your group will take on two of the roles; the other person will take on one role.</td>
</tr>
<tr>
<td>(two constituents and policymaker)</td>
<td></td>
</tr>
<tr>
<td><strong>Three-on-one meeting</strong></td>
<td>Each person in your group will take on one of the roles above.</td>
</tr>
<tr>
<td>(three constituents and policymaker)</td>
<td></td>
</tr>
<tr>
<td><strong>Group of four or more</strong></td>
<td>Three people in the group should take on one role each. Other participants should serve as “eyes and ears” during the meeting.</td>
</tr>
<tr>
<td></td>
<td>Note: If there are two or three issues to discuss, participants may switch roles for second and third issue, if desired.</td>
</tr>
</tbody>
</table>
Meeting Script

**Instructions:** Fill in information indicated by brackets. **Focus on the introduction, showing appreciation, your talking points and your story.** If you have time, you may restate other parts of the script in your own words.

**Group meeting instructions:** Plan what you will each say in your selected roles. Determine how you will signal each other or what you will say to transition from one person and stage of the meeting to another.

<table>
<thead>
<tr>
<th>Issue and position: Protect mental health services in HB 39</th>
</tr>
</thead>
</table>

## Stage 1 of Meeting: Make a connection

<table>
<thead>
<tr>
<th>Role</th>
<th>Script: Introduce yourself</th>
</tr>
</thead>
<tbody>
<tr>
<td>Policymaker (Sen. Walker)</td>
<td>Welcome--thank you for coming to see me. I always like to see my constituents.</td>
</tr>
</tbody>
</table>
| Lead | Hello, Senator.  
I'm [your name]  
and I'm a constituent from [town or city you live in].  
I'm a member of [NAMI State Org or NAMI Affiliate],  
part of America's largest grassroots mental health organization, the National Alliance on Mental Illness. |
| Optional: If another participant | Hello, Senator.  
I'm [your name]  
and I'm from [town or city you live in]. |
<p>| Policymaker (Sen. Walker) | It's a pleasure to have you here. I know NAMI--your organization does a great job of bringing up mental health issues. |</p>
<table>
<thead>
<tr>
<th>Role</th>
<th>Script: Show appreciation</th>
</tr>
</thead>
</table>
| **Lead**                 | [In two or three sentences, thank your policymaker for his/her time. Show appreciation for something your policymaker has done. Or, touch on a shared interest or connection. Tip: Use your backgrounder.]

<table>
<thead>
<tr>
<th>Policymaker</th>
<th>I certainly appreciate your comments. So, tell me what brings you to my office today.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sen. Walker</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role</th>
<th>Script: Issue and position</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lead</strong></td>
<td>Senator, I’m here because I want to urge you to protect mental health services in HB 39, the mental health budget.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stage 2 of Meeting: Deliver your message</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Role</th>
<th>Script: The need or problem</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Messenger</strong></td>
<td>More families than ever are seeking help from our mental health centers. But with budget cuts, people can't get the mental health services they need.</td>
</tr>
<tr>
<td>Role</td>
<td>Script: Talking points</td>
</tr>
<tr>
<td>--------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Messenger</td>
<td>[Provide a series of brief talking points. Use points from the Briefing Sheet or use your fact sheet to create your own.]</td>
</tr>
<tr>
<td>Policymaker (Sen. Walker)</td>
<td>I’ve always been a supporter of mental health. But, it’s going to be an extremely tight budget this year. There are serious revenue shortfalls and we’re still figuring out where we can find savings. We’ve got to get spending under control.</td>
</tr>
<tr>
<td>Role</td>
<td>Script: Add your story</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Storyteller</strong></td>
<td>Senator, your support would mean a lot.</td>
</tr>
<tr>
<td></td>
<td>[Describe how you are affected by mental illness. Add highlights of your story that are relevant to the issue.]</td>
</tr>
<tr>
<td><strong>Policymaker (Sen. Walker)</strong></td>
<td>Thank you for sharing your story. It is stories like yours that help illustrate the need for mental health care. Unfortunately, it is going to be a difficult year to find resources.</td>
</tr>
<tr>
<td><strong>Role</strong></td>
<td>Script: What will help others (the solution)</td>
</tr>
<tr>
<td><strong>Messenger</strong></td>
<td>Preserving mental health funding will mean that mental health services are there when people need them. It’s an investment in health and productivity.</td>
</tr>
<tr>
<td>Role</td>
<td>Script: Make your “ask”</td>
</tr>
<tr>
<td>------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Lead</td>
<td>The people of our state need your vote to protect mental health care. Can we count on your support of HB 39, Senator?</td>
</tr>
<tr>
<td>Policymaker (Sen. Walker)</td>
<td>You’ve made some excellent points today and I’ll keep them in mind as we’re working on the budget. I know how important mental health services are.</td>
</tr>
<tr>
<td>Lead</td>
<td>PolicyMaker (Sen. Walker)</td>
</tr>
<tr>
<td>Role</td>
<td>Stage 3 of Meeting: Close on a positive note</td>
</tr>
<tr>
<td>Optional: If another participant</td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>Script: Provide information</td>
</tr>
<tr>
<td>Messenger</td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>Script: Offer to be a resource</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Lead</td>
<td>I’d also like you to know that NAMI would be happy to serve as a resource to you on mental health issues in the future.</td>
</tr>
<tr>
<td>Policymaker (Sen. Walker)</td>
<td>Certainly. Please give my staff your contact information before you leave so we can get hold of you.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role</th>
<th>Script: Make a request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Storyteller</td>
<td>Senator, if you have time, I would be honored if you would have your picture taken for our newsletter.</td>
</tr>
<tr>
<td>Policymaker (Sen. Walker)</td>
<td>Of course, I’d be happy to take a picture. Thank you, again, for meeting with me.</td>
</tr>
</tbody>
</table>
Constructive Feedback Form for Two-On-One Meeting

In the space below each scale, identify where the meeting was strong or what would strengthen the meeting. Note: Feedback sheet includes only selected parts of a meeting with a policymaker.

<table>
<thead>
<tr>
<th>Stage 1 of Meeting: Make a connection</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introductions</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Could be strengthened</td>
<td>Works fine</td>
<td>Very strong</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Show appreciation                     | 1 | 2 | 3 | 4 | 5 |

<table>
<thead>
<tr>
<th>Stage 2 of Meeting: Deliver your message</th>
</tr>
</thead>
<tbody>
<tr>
<td>The need or problem</td>
</tr>
</tbody>
</table>

| Talking points                          | 1 | 2 | 3 | 4 | 5 |

| Your story                              | 1 | 2 | 3 | 4 | 5 |

| Make your "ask"                          | 1 | 2 | 3 | 4 | 5 |

<table>
<thead>
<tr>
<th>Stage 3 of Meeting: Close on a positive note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make a request</td>
</tr>
</tbody>
</table>
Sample Thank You Note

[Date]

Greeting

Dear Senator Walker:

Thank you

Thank you so much for meeting with me on May 30th to discuss the state mental health budget. As I mentioned in our meeting, access to mental health treatment makes a tremendous difference.

Request

I hope I can count on your support to preserve mental health services in HB 39.

Supporting detail

These services provide treatment and the opportunity for recovery for over 137,000 adults and 39,000 youth in Oregon who live with serious mental health conditions.

Thank you

Thank you for your attention to mental health funding.

Closing

Sincerely,

John Adams, President
NAMI Springville
5555 SW Green St.
Springville, OR 97999
(555) 555-5555
jadams@namispringville.org
## Checklist for Thank You

<table>
<thead>
<tr>
<th></th>
<th>Greeting</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The greeting should include the elected title of an official and his or her last name.</td>
</tr>
<tr>
<td></td>
<td>Thank you</td>
</tr>
<tr>
<td></td>
<td>Thank your elected official for the opportunity to meet with you or your group. Include a few brief details of who you are, the issue(s) you discussed and on what date.</td>
</tr>
<tr>
<td></td>
<td>Request</td>
</tr>
<tr>
<td></td>
<td>Politely restate your key “ask” or request for action or position. If known, add specific bill number.</td>
</tr>
<tr>
<td></td>
<td>(Optional): Supporting detail</td>
</tr>
<tr>
<td></td>
<td>Add or repeat a fact, data, detail or talking point that supports your position.</td>
</tr>
<tr>
<td></td>
<td>(Optional): Invitation</td>
</tr>
<tr>
<td></td>
<td>If you like, extend an invitation to attend your NAMIWalk, visit a Connection support group, local program, etc.</td>
</tr>
<tr>
<td></td>
<td>Thank you</td>
</tr>
<tr>
<td></td>
<td>Thank your elected official for his or her work on behalf of constituents who live with mental illness.</td>
</tr>
<tr>
<td></td>
<td>Closing</td>
</tr>
<tr>
<td></td>
<td>Respectful closing (e.g. Sincerely), signature (if mailed) and contact information. Include your printed name, organization, address, phone number and email address.</td>
</tr>
</tbody>
</table>
## The Briefing Sheet Template

**Finding information**
- Consult your NAMI State Organization for the information you need. If information is not available, consider the following sources:
- Look up the bill on your legislature’s website for information on committee assignment and sponsors or call the legislature’s information line.
- Consider using NAMI fact sheets on the web at www.nami.org or other reputable sources for facts to use in talking points.
- Your “ask” should be in alignment with NAMI’s policy platform at www.nami.org and your NAMI State Organization’s position.

<table>
<thead>
<tr>
<th>The issue</th>
<th>The “ask”</th>
<th>The need or problem, talking points and solution</th>
<th>Committee and sponsors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>The need or problem:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Talking Points:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>The solution (what will help):</td>
<td></td>
</tr>
</tbody>
</table>
## The Backgrounder Template

### For basic information:
- Go to www.nami.org/advocacy, enter your zip code
- Click on your state policymaker's name
- Click on the Bio tab for basic information
- Click on the Committee tab for info about committees
- Click on the Contact tab for a link to policymaker's website

### Options for more information:
- Visit your policymaker's website for more information
- Visit www.votesmart.org/officials
- Google your policymaker's name

<table>
<thead>
<tr>
<th>Elected official</th>
<th>Committee assignments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact info</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal info</th>
<th>Bio</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Meeting Script Template**

**Instructions:** Identify your issue and position. Plan what you will say in the "Script" portion of the template below.

**Group meeting instructions:** Plan what you will each say in your selected roles. Determine how you will signal each other or what you will say to transition from one person and stage of the meeting to another.

<table>
<thead>
<tr>
<th>Issue and position:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Stage 1 of Meeting: Make a connection</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Role</strong></td>
</tr>
<tr>
<td>Lead</td>
</tr>
<tr>
<td>Optional: If other participant(s)</td>
</tr>
</tbody>
</table>

*Page 1 of Script*
<table>
<thead>
<tr>
<th>Role</th>
<th>Script: Show appreciation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>In two or three sentences, thank your policymaker for his/her time. Show appreciation for something your policymaker has done. Or, touch on a shared interest or connection. Tip: Use your backgrounder.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lead</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role</th>
<th>Script: Issue and position</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Describe your issue. Indicate the position or action you would like your policymaker to take.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lead</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Stage 2 of Meeting: Deliver your message

<table>
<thead>
<tr>
<th>Role</th>
<th>Script: The need or problem</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mention the problem or need you want addressed. Transition to the challenge(s) faced by people living with mental illness.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Messenger</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>Script: Talking points</td>
</tr>
<tr>
<td>------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Messenger</td>
<td>Make your points. Talk concisely about the impact of the issue or bill and/or why the bill is needed. Use points from your Briefing Sheet, if possible.</td>
</tr>
<tr>
<td>Role</td>
<td>Script: Add your story</td>
</tr>
<tr>
<td>-------------</td>
<td>--------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Storyteller</td>
<td>Describe how you are affected by mental illness. Add highlights of your story that are relevant to the issue.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role</th>
<th>Script: What will help others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Messenger</td>
<td>Propose a solution. Let your policymaker know what will help address the need or problem you described.</td>
</tr>
<tr>
<td>Role</td>
<td>Script: Make your “ask”</td>
</tr>
<tr>
<td>------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Ask your policymaker if you can count on their support (or opposition). Be specific about the action or position you want them to take. Include a bill number, if possible.</td>
</tr>
</tbody>
</table>

**Lead**

---

**Stage 3 of Meeting: Close on a positive note**

<table>
<thead>
<tr>
<th>Role</th>
<th>Script: Say thank you</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Thank your policymaker. Let your policymaker know you appreciate their time and attention. If you like, mention that you will be following up.</td>
</tr>
</tbody>
</table>

**Lead**

---

**Optional: If other participant(s)**
<table>
<thead>
<tr>
<th>Role</th>
<th>(Optional) Script: Provide information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Leave a fact sheet. If possible, provide a fact sheet, legislative packet or summary of your issue(s) or bill(s). Ask for support on your other issues, if applicable. Also, provide information on your organization and its programs.</td>
</tr>
</tbody>
</table>

**Messenger**

<table>
<thead>
<tr>
<th>Role</th>
<th>(Optional) Script: Offer to be a resource</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Be helpful. Let your policymaker know you are willing to serve as a resource on mental health issues.</td>
</tr>
</tbody>
</table>

**Lead**

<table>
<thead>
<tr>
<th>Role</th>
<th>(Optional) Script: Make a request</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Request a picture or extend an invitation. Ask your policymaker to pose for a group photo or ask him/her to visit a local program or event, like the NAMI Walk.</td>
</tr>
</tbody>
</table>

**Storyteller**
MENTAL HEALTH IN THE U.S. - BY THE NUMBERS

Prevalence of Mental Illness

- 1 in 5 adults (43.8 million, or 18.5%) experiences mental illness in a given year.1
- 1 in 25 adults (10 million, or 4.2%) experiences a serious mental illness that substantially interferes with one or more major life activities.2
- 1 in 5 youth aged 13–18 (21.4%) experiences a severe mental disorder at some point during their life. For children aged 8–15, the estimate is 13%.3
- 1.1% of adults live with schizophrenia.4
- 2.6% of adults live with bipolar disorder.5
- 6.9% of adults had at least one major depressive episode in the past year.6
- 18.1% of adults experienced an anxiety disorder such as posttraumatic stress disorder, obsessive-compulsive disorder or phobia.7
- Among the 20.2 million adults who experienced a substance use disorder, half (10.2 million, or 50.5%) had a co-occurring mental illness.8

Social Impact

- 26% of homeless adults staying in shelters live with serious mental illness and 46% live with severe mental illness and/or substance use disorders.9
- 20% of state prisoners and 21% of local jail prisoners have “a recent history” of a mental health condition.10
- 70% of youth in juvenile justice systems have at least one mental health condition and at least 20% live with a serious mental illness.11
- Only 41% of adults in the U.S. with a mental health condition received mental health services in the past year. Among adults with serious mental illness the percentage is higher: 62.9%.8
- Among children aged 8-15 who needed mental health treatment, only half (50.6%) received mental health services in the previous year.12
- African Americans and Hispanic Americans used mental health services at about half the rate of Caucasian Americans in the past year; Asian Americans at about one-third the rate.13
- Half of all chronic mental illness begins by age 14; three-quarters by age 24. Despite effective treatment, there are long delays—sometimes decades—between the first appearance of symptoms and when people get help.14

Lack of Treatment, the Consequences

- Serious mental illness costs America $193.2 billion in lost earnings per year.15
- Mood disorders, including major depression, dysthymic disorder and bipolar disorder, are the third most common cause of hospitalization for youth and adults aged 18–44.16
- Individuals living with serious mental illness face an increased risk of having chronic medical conditions.17 Adults living with serious mental illness die on average 25 years earlier than others, largely due to treatable medical conditions.18
- Over one-third (37%) of students with a mental health condition age 14–21 and older who are served by special education drop out—the highest dropout rate of any disability group.19
- Suicide is the 10th leading cause of death,20 the 3rd leading cause of death for people aged 10–2421 and the 2nd leading cause of death for people aged 15–24.22
- More than 90% of children who die by suicide have a mental health condition.23
- Each day an estimated 18-22 veterans die by suicide.24
References

Guide to Finding Facts

Fact sheets and other information are downloadable from NAMI at www.nami.org/stateadvocacy and www.nami.org/elections.

Searching the Web sites of other organizations and agencies can also be very helpful. Here is a sampling of some good websites or publications:

**Children’s Mental Health**

**National Business Group on Health**
An Employer’s Guide to Child and Adolescent Mental Health

**NAMI’s Child and Adolescent Action Center**
http://www.nami.org/caac

**National Center for Children in Poverty** (children’s mental health)
http://www.nccp.org/
(Select Publications—by topic—children’s mental health)

**National Center for Mental Health and Juvenile Justice** (juvenile justice)
Blueprint for Change: A Comprehensive Model for the Identification and Treatment of Youth with Mental Health Needs in Contact with the Juvenile Justice System
http://www.modelsforchange.net/publications/148

**Criminal Justice**

**Criminal Justice/Mental Health Consensus Project**
http://consensusproject.org/

**Reentry Policy Council**
http://reentrypolicy.org/

**Economic and Health Impacts**

**National Business Group on Health**
An Employer’s Guide to Behavioral Health Services
http://www.businessgrouphealth.org/pdfs/fullreport_behavioralHealthservices.pdf

**The Milken Institute**
The Economic Burden of Chronic Disease (State Fact Sheets)

**Housing**

**Corporation for Supportive Housing**
www.csh.org

**National Alliance to End Homelessness**
http://www.endhomelessness.org/

**Technical Assistance Collaborative**
http://www.tacinc.org
Finding Facts Continued

**Medicaid and the Uninsured**  
Kaiser Foundation on Medicaid and the Uninsured  
www.kff.org

Kaiser Family Foundation State Health Facts  
http://www.statehealthfacts.org/

**Research and Statistics**  
National Institute of Mental Health Science News  

National Institute of Mental Health  
Statistics (select tabs on prevalence, cost, disability and suicide)  

**State Mental Health Revenue and Expenditures**  
NRI Inc. (National Association of State Mental Health Program Directors Research Institute)  
http://www.nri-inc.org/projects/Profiles/Prior_RE.cfm

**Suicide**  
America Association of Suicidology  
http://www.suicidology.org/web/guest/stats-and-tools
## Basic Strategies for Shaping the Dialogue

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<tr>
<th></th>
<th>Use person-first language</th>
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| 1. | **Emphasize the person**, not the illness. Avoid terms like “suffering.” Use positive concepts, like recovery, to promote empathy.  
**Example:** Use “people [or person] living with mental illness,” rather than “the mentally ill, people with brain disorders, or people suffering with mental illness.” |

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<th>2.</th>
<th>Manage spin</th>
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<tr>
<td></td>
<td><strong>Don’t take the bait.</strong> Avoid getting trapped in other issues. Practice bringing the focus back to where it belongs—on people living with mental illness.</td>
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<th>3.</th>
<th>Expect resistance</th>
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|   | **Provide facts.** Present relevant facts as a way to help inform opinions.  
**A negative opinion:** Supportive housing is too expensive.  
**Using a fact in response:** Supportive housing significantly reduces shelter use, hospitalization and involvement with the criminal justice system. |

|   | **Don’t argue.** Anticipate challenging comments and questions and practice positive responses. Start by acknowledging the concern.  
**A concern:** We have to balance the budget and we’re not going to raise taxes. Everything, including mental health, needs to take its share of cuts.  
**Sample responses:**  
- I know the budget is tight, but when children and adults get the right mental health care at the right time, they get better and stand a real chance of leading independent and productive lives.  
- I understand that these are tough economic times, but mental illness doesn’t go away in bad times. In fact, more people than ever need help. Services should be there when they are needed the most. It’s an investment that stabilizes families, businesses and communities.  
- I know that tough times require tough choices, but children and adults who live with serious mental illness rely on Medicaid and public mental health programs for treatment and supports. Budget cuts pull the rug out from them. Stable funding is needed to provide services that maintain recovery. Mental health is the last place we should cut. |
Common Greetings

The following are common greetings that will help you properly address elected officials.

<table>
<thead>
<tr>
<th>Official</th>
<th>Address</th>
<th>Greeting for Letter or Email</th>
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<tbody>
<tr>
<td>Governor</td>
<td>The Honorable (Full Name) Governor of (State) (Office Address)</td>
<td>Dear Governor (Last Name)</td>
</tr>
<tr>
<td>State Senator</td>
<td>The Honorable (Full Name) (Office Address)</td>
<td>Dear Senator (Last Name)</td>
</tr>
<tr>
<td>State Representative</td>
<td>The Honorable (Full Name) (Office Address)</td>
<td>Dear Representative (Last Name)</td>
</tr>
<tr>
<td>State Assemblyman</td>
<td>The Honorable (Full Name) (Office Address)</td>
<td>Dear Assemblyman or Assemblywoman (Last Name)</td>
</tr>
<tr>
<td>U.S. Senator</td>
<td>The Honorable (Full Name) United States Senate (Senate Office Building) Washington, D.C. (zip)</td>
<td>Dear Senator (Last Name)</td>
</tr>
<tr>
<td>U.S. Representative</td>
<td>The Honorable (Full Name) House of Representatives (House Office Building) Washington, D.C. (zip)</td>
<td>Dear Representative or Congressman or Congresswoman</td>
</tr>
</tbody>
</table>
## How to Contact Elected Officials

The following are several options for contact information for elected officials.

<table>
<thead>
<tr>
<th>✓ NAMI Website</th>
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<tbody>
<tr>
<td>Take advantage of NAMI’s Legislative Action Center.</td>
</tr>
<tr>
<td>- Go to <a href="http://www.nami.org/advocacy">www.nami.org/advocacy</a></td>
</tr>
<tr>
<td>- Enter your zip code under “Find your elected officials” to get links to phone numbers, addresses, and email addresses for your state and federal officials.</td>
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<tr>
<th>✓ Web Search</th>
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<tr>
<td>Search the Web for your state’s legislature or general assembly. When there, find out how to get to contact pages or a Find Your Legislator page.</td>
</tr>
<tr>
<td>Note your policymakers’ contact information in an easy-to-find place, like next to your phone or computer. Put your policymakers’ email addresses into your email contacts.</td>
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<tr>
<th>✓ Legislative Guides</th>
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<tr>
<td>Some legislatures print handy legislative guides with maps, pictures of policymakers, contact info, and useful information. Where available, these are often free or very reasonably priced and a “trade secret” of lobbyists.</td>
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My Commitment

Today, I learned and practiced how to advocate effectively with elected officials. Now, I commit to act.

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<th>In the next 48 hours, I will:</th>
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<tr>
<td>“How wonderful it is that nobody need wait a single moment before starting to improve the world.” —Anne Frank</td>
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<th>In the next week, I will:</th>
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<tr>
<td>“Act as if what you do makes a difference. It does.” —William James</td>
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<tr>
<th>Over the next three months, I will:</th>
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<tr>
<td>“Knowing is not enough; we must apply. Willing is not enough; we must do.” —Goethe</td>
</tr>
</tbody>
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NAMI Smarts for Advocacy
Meeting Your Policymaker Evaluation

Trainer’s Name: _______________________________   Date of Training: ____________

Location of Training (City & State): ____________________________________________

My Name (optional, but preferred): ____________________________________________

1. Overall, my knowledge and skill level in meeting with my policymaker is...

   Before the training: (Circle your rating)   After the training: (Circle your rating)
   1 2 3 4 5 6 7 8 9 10
   None Some Good Excellent
   1 2 3 4 5 6 7 8 9 10
   None Some Good Excellent

2. Overall, my level of confidence in meeting with my policymaker is...

   Before the training: (Circle your rating)   After the training: (Circle your rating)
   1 2 3 4 5 6 7 8 9 10
   None Some Good Excellent
   1 2 3 4 5 6 7 8 9 10
   None Some Good Excellent

3. What did you learn that was most meaningful or helpful to you today?

4. Where do you plan to use what you learned and practiced? Or, what will you do differently as a result of this training?

5. What comments, if any, do you have about this training?

6. NAMI seeks to support the entire community. To help us track how we are doing and for funding purposes, please check all that apply.

   I am:  □ American Indian or Alaska Native  □ Person living with a mental illness
   □ Asian American             □ Family of adult living with a mental illness
   □ Black or African American □ Parent or legal guardian of minor-aged child
   □ Hispanic or Latino         living with a mental illness
   □ Native Hawaiian, Pacific Islander □ Mental health service provider, including
   □ White                       peer provider
   □ Multiracial                  □ Other mental health advocate
   □ Other: ______________________  □ Military service member, veteran
   □ Other: ______________________  or military family member

   □ Other: ______________________