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Advocacy Toolkit

**Resources to Engage in Occupational Therapy Advocacy in North Carolina**

Contact:

[ncotaadvocacy@gmail.com](mailto:ncotaadvocacy@gmail.com)

**Informational Sites**

NCOTA Advocacy Webpage  
https://www.ncota.org/advocacy

The North Carolina Occupational Therapy Association's Advocacy Webpage provides information regarding legislative advocacy initiatives, recent advocacy wins, and additional materials to use when engaging in advocacy. On this page, you can also find information about NCOTA's Lobbyist, Ashley Perkinson, who assists North Carolina occupational therapy practitioners with advocacy questions and needs.

AOTA Advocacy Webpage  
https://www.aota.org/advocacy

The American Occupational Therapy Association's Advocacy Webpage provides information regarding advocacy efforts at the national level. This page provides the opportunity for you to explore recent advocacy news, the American Occupational Therapy Political Action Committee, as well as methods of engaging in everyday advocacy. There is also information regarding how to identify and contact your elected officials and on participating in Hill Day, when occupational therapy practitioners speak to federal law makers in Washington, DC.

North Carolina Department of Health and Human Services Alerts  
https://www.ncdhhs.gov/news

North Carolina's Department of Health and Human Services manages the delivery of health and human-related services for all North Carolinians and works closely with health care professionals as well as community leaders, advocacy groups, governmental entities, and many other stakeholders. This webpage allows you to stay informed regarding NCDHHS activity. In addition to registering for news alerts, visiting this page allows you to explore NCDHHS press releases, find contact information for NCDHHS Office of Communications, view upcoming NCDHHS events, read newsletter articles, and find NCDHHS social media accounts.

NCDHHS Provider Playbook on Medicaid Transformation  
https://medicaid.ncdhhs.gov/providers/provider-playbook-nc-medicaid-managed-care

This webpage allows providers to access the latest information, tools, and other resources to help providers and their patients smoothly transition to North Carolina Medicaid Managed Care. This site is updated regularly and features trending topics, fact sheets, training courses, beneficiary materials, and fee schedule archives.

North Carolina General Assembly  
ncleg.gov

The NCGA is the legislative branch of North Carolina's government where laws are developed. This website provides information including proposed legislation, a schedule of Senate and House of Representatives activities, and how to determine who your legislators are.

**Survival Skills for Successful Advocacy**

Successful advocacy relies on the passion and dedication of individuals as well as strategy and knowing how to sustain your efforts. The following survival skills are a noncomprehensive list of guidelines for sustainable advocacy work. These survival skills are from [Chapter 30 of the University of Kansas’s Community Toolkit.](https://ctb.ku.edu/en/table-of-contents/advocacy/advocacy-principles/survival-skills/main)

**Accentuate the Positive**

* Publicly recognize when something positive happens, no matter how small that is.
* Give thanks to others for their efforts as this will build rapport and motivation for future contributions.

**Make the Values and Accomplishments of Your Organization Known to Your Community**

* Receiving and retaining public attention helps further your initiatives, especially when that attention is focused on the principles and values of your organization as this makes it difficult for petty arguments to take attention away from your group.
* Communicating the accomplishments of your group helps possible supporters know why they should back your group and join your successful efforts.

**Plan for Small Wins to Maintain Motivation**

* When developing a plan of action for your organization, work in short-term and intermediate goals to break up the time that goes between major breakthroughs.
* Once you’ve accomplished your small wins, celebrate them!

**Present Issues How You Want Others to See Them**

* The way that individuals view an issue is heavily dependent on how it is presented to them.
* By framing an issue in your own words, you may be able to influence and encourage more people to support your case.

**Check Your Facts**

* Your actions and public statements should be guided by factual information. Being caught using inaccurate information or documentation could damage your organization’s reputation and take away attention from the cause you are working for.
* Collect data about the issues and options you represent to support your position.
* Verify your information by using as many reputable sources as possible to support your cause if anyone challenges your position and argument.
* Practice using your verified facts and figures to explain why your organization does what it does and provide the sources for your information. It is important not only to have supporting facts, but to also show that you understand this information.

**Be Passionate and Persistent**

* Passion and persistence are key to sustaining your advocacy efforts especially when faced with public resistance to change.
* Passion provides your movement with energy and may motivate undecided individuals and communities to join your efforts.
* Persistence helps your cause remain in the public eye, assists you in following through on commitments, and forces anyone opposed to your case to keep up with your level of dedication.

**Make Issues Local and Relevant**

* Your chances of securing public support increase if you are able to tie your issue to the local level.
* Some strategies to make your cause relevant to the local community include using locally gathered statistics, using local role models, or providing information about your issue in a particular way which will help the community members comprehend how their lives could be affected.
* Connecting your issue to related events in the community aids in publicizing your event and strengthening your position in the community.

**How to Build a Relationship with Your Legislator**

1. **Send a note or email to introduce yourself:** Introducing yourself to your legislator is an easy way to begin developing your relationship. The note doesn’t have to be long but should include that you are an occupational therapist or occupational therapy assistant living in the official’s district who is engaged in and interested in the legislative process.
2. **Learn more about their policy and personal backgrounds:** Understanding your legislator’s position on policy and their personal background helps guide communication and create connection. This information can be found by either researching your official online or speaking directly with the legislator and/or their staff. Most legislators have a webpage on the General Assembly’s site, but they likely have a separate site where they communicate more with constituents.
   1. **Sign up for your legislator’s updates and/or follow them on social media.** Many legislators have weekly or monthly e-mail updates which provide information about their policy priorities and what events they plan to attend.
   2. **Find some commonalities.** Finding and discussing the common interests between you and your legislators allows for connection to be formed on a personal level. These areas of shared interest can be policy areas (i.e. support for occupational therapy or understanding of Medicaid) or something from your personal lives (i.e. the same alma mater or a favorite event in your community).
   3. **Ask about their experience with occupational therapy.** Ask your legislator if they know someone who has benefitted from occupational therapy. Perhaps they have a friend or child who received occupational therapy. This is a great way to connect and create a foundation for later outreach efforts.
3. **Attend legislator’s events in your community:** Many legislators hold town halls or community events in their local district. Attending these events provides the opportunity to increase your visibility and remind your legislator about the importance of occupational therapy. Many elected officials share the events they will be attending and speaking at in their newsletters or on social media.

**Meeting with Legislators**Inviting legislators to visit your office, coffee meetings, or other community events is a great way to build a relationship while also educating them about occupational therapy. Because health care policy is such an important issue to so many, members of the North Carolina General Assembly want to be informed about the issues and connect with practitioners.

Event Ideas

* Invite a legislator to visit your office or practice after hours
* Invite a legislator to visit a therapy group or community event
* Collaborate with several area OT practitioners to invite a legislator to coffee

Before the Event

1. Make sure that you colleagues are comfortable with issuing the invitation.
2. Determine which issues you want to address and ensure that everyone who may interact with the legislator is informed and prepared to speak about the issues that you want highlighted.
3. If your dates of availability are flexible, offer several options to maximize the possibility of legislator attendance. Fridays and Mondays are generally the best weekdays for legislators’ schedules when they are in the legislative session.
4. Issue the invitation with as much information as possible, including date, time, location, and other pertinent details.
5. Don’t be discouraged if a legislator can’t make it or has difficulty scheduling a meeting. Their schedules are busy and are often changing because of committee meetings and votes in Raleigh.
6. Prepare materials which accurately and concisely present the issues you are addressing which the elected official can review and take with them.

During the Event

1. Make sure that you are available to greet the legislator when they arrive.
2. Keep events brief, 30 minutes to one hour if possible.
3. Introduce the legislator during the program, if appropriate.
4. Be sure to introduce yourself to the legislator and introduce a few patients as well, if appropriate.
5. Focus on the issues important to occupational therapy and demonstrate the importance of occupational therapy in your practice setting.
6. Allow the legislator to ask questions and have informal discussions about experiences and problems.
7. Make sure to thank the legislator for their time.
8. Take photos of the event.

After the Event

1. Send a thank you note to the legislator. If appropriate, have your students send a thank you card or notes as well.
2. Thank the legislator on social media for attending the event. Share photos if possible. On Twitter use the hashtags #ncpol and #ncga.
3. Send photos and information about the event to NCOTA to include in their social media posts.

**General Talking Points**These talking points can serve as a starting place when you are determining what to discuss with an elected official.

**Overall Message:**Occupational therapy practitioners help people of all ages participate in the things they want and need to do through the therapeutic use of everyday activities (occupations). Unlike other professions, occupational therapy helps people function in all of their environments (home, work, school, community) and addresses the physical, psychological, and cognitive aspects of their well-being through engagement in occupation.

* Thank you for your support of occupational therapy.
* Occupational therapy is an important part of our community and improving health outcomes. Common occupational therapy interventions include:
  + Helping children with disabilities to participate fully in school and develop social skills
  + Helping people recovering from injury to regain function through retraining and/or adaptations
  + Providing supports for older adults experiencing physical and cognitive changes
* Occupational therapists and occupational therapy assistants are qualified, trained, and licensed professionals.
  + Entry level practice requires a master’s degree for occupational therapists.
  + Entry level practice requires an associate’s degree for occupational therapy assistants.
* Occupational therapy is an evidence-based, science-driven profession that uses the most up-to-date research to improve lives.
* Occupational therapy helps improve patients’ lives while saving health care dollars.
  + An independent study found that occupational therapy is the only spending category where additional spending lowered hospital readmission rates.
  + Occupational therapy takes a holistic approach that focuses on wellness, health promotion, and prevention.
  + Occupational therapy is also an important part of identifying and addressing social determinants of health.
* Please continue to support occupational therapy in North Carolina.

**Written Communication Guidelines and Examples**

Guidelines

When to Write a Letter:

When determining the best time to write a letter to your elected official, you should consider at what time your communication will have the greatest impact. Below are examples of times when writing to legislators is most effective.

* Whenever an issue comes up that affects occupational therapy
* In the time leading up to an election when elected officials will be eager to please constituents and secure votes
* Before an important vote to ensure that your needs and point of view are being expressed during the decision-making process
* While officials are setting a budget to secure necessary funding for programs and/or policy initiatives
* Immediately following action taken by an official to either express support or opposition while the action is still fresh in the official’s mind
* At the start of a new session to introduce yourself and your policy priorities

How to Write a Letter:

Once you have decided who you will be writing to, follow these steps to deliver an organized, thorough, and thoughtful letter to explain your position to your elected officials.

* Open the letter in an official manner and explain why you are writing to get the attention of your audience
* Provide a summary of your understanding of the policy being considered and explain your position
* Describe how the proposed changes will affect you, other OT practitioners, and OT service recipients
* Describe what you would like to take place (i.e. policy implemented/policy changed/policy not implemented)
* Address any past support that the past official may have provided
* Ask how you can support the legislator if you are able to
* Close your letter
* Check for spelling and grammatical errors before sending

Examples

**Introduction E-Mail**Dear Representative NAME or Senator NAME,

My name is [YOUR NAME], and I am an occupational therapist/occupational therapy assistant in your district. As an occupational therapy practitioner, I work with [INSERT POPULATION] to help them develop, recover, or maintain the activities/occupations that are important to their lives.

I wanted to send you a note to tell you how important occupational therapy is in our community. Occupational therapy helps people of all ages participate in the things they want and need to do.

[*Insert your own story about the importance of occupational therapy or a brief explanation of why working as an occupational therapy practitioner is important to you.]*

Thank you for your support of occupational therapy. If you ever have questions about our work in [YOUR PRACTICE SETTING], please don’t hesitate to contact me at [INSERT EMAIL ADDRESS] or [INSERT PHONE NUMBER].

**Advocacy Ask Letter (adapted from World Federation of OT)**

[*Place on letterhead paper*]

[*Your Name*

*Address*

*Telephone Number*

*Email*]

[*Name of Recipient of Letter*

*Organization*

*Address]*

[*Insert date*]

Re: [*Advocacy Issue*]

Dear Representative or Senator:

I am writing to you as the [*state your role, organization represented*]. [*Provide brief description of your organization in one to two sentences to demonstrate your credibility and authority to comment on the advocacy issue*].

The purpose of this letter is to introduce a very important matter regarding [*state advocacy issue*]. I ask you to provide [*state what you want the organization to do regarding the advocacy issue, e.g. write a letter, change practice, etc.* ]

[*Provide a one to two paragraph description of advocacy issue, highlighting why the recipient should be concerned about the advocacy issue. Discuss how the recipient may benefit from taking the action you are requesting to address the issue*].

I look forward to a meeting with you where I can answer any questions or concerns that you may have on the [*state advocacy issue*]. I will call your office within the next week to arrange a meeting.

OR

I look forward to further communication with you. To assist with this effort, I have attached [*describe the information you have enclosed, e.g. template letter, background documentation*] to share with [*name how you wish the organisation to share the information*]. I will contact you your office in the next week to answer any questions or concerns that you may have regarding [*state advocacy issue*].

Sincerely,

[*Your name and credentials*

*Your role/title*]

cc: [*indicate who you have copied, for example, senior staff or deputies*]

include: *Sample letter (optional)*

*Background information regarding the advocacy issue (e.g. fact sheet)*

**Thank You Letter (adapted from World Federation of OT)**

[*Place on letterhead paper*]

[*Your Name*

*Address*

*Telephone Number*

*Email*]

[*Name of Recipient of Letter*

*organization*

*Address]*

[*Insert date*]

Re: [*Advocacy Issue*]

Dear Representative or Senator:

On behalf of the [*state organization you* represent] and the [*state the people you represent i.e., occupational therapists in your hospital system/school system, etc.*], I would like to thank you for taking the time to meet regarding [*state advocacy issue*]

I trust that I have provided the information you require to take action on the important matters we discussed. [*Very briefly describe what action you wish the letter recipient to take in relation to the advocacy issue*]*.* Please contact me if additional information or assistance is required.

Thank you for your assistance. [*Provide a one to two sentence explanation of how the requested action is expected to impact the advocacy issue*].

Sincerely,

[*Your name and credentials*

*Your role/title*]

cc: [*indicate who you have copied, for example, senior staff or deputies*]