Advocacy Tool Kit for Peer Support: Giving a Voice to Community Health Workers
National Council of La Raza

The National Council of La Raza (NCLR)—the largest national Hispanic civil rights and advocacy organization in the United States—works to improve opportunities for Hispanic Americans. Through its network of nearly 300 affiliated community-based organizations, NCLR reaches millions of Hispanics each year in 41 states, Puerto Rico, and the District of Columbia. To achieve its mission, NCLR conducts applied research, policy analysis, and advocacy, providing a Latino perspective in five key areas—assets/investments, civil rights/immigration, education, employment and economic status, and health. In addition, it provides capacity-building assistance to its Affiliates who work at the state and local level to advance opportunities for individuals and families.

Founded in 1968, NCLR is a private, nonprofit, nonpartisan, tax-exempt organization headquartered in Washington, DC, serving all Hispanic subgroups in all regions of the country. It has state and regional offices in Chicago, Los Angeles, Miami, New York, Phoenix, and San Antonio.

NCLR’s Institute for Hispanic Health (IHH) is dedicated to reducing the incidence, burden, and impact of health problems among Hispanic Americans. IHH works in close partnership with NCLR Affiliates, government partners, private funders, and other Hispanic-serving organizations to deliver the highest-quality health interventions. These interventions focus on the improvement of, access to, and utilization of health promotion and disease prevention programs. IHH is committed to providing technical assistance that is culturally competent and linguistically appropriate.

Peers for Progress

Peers for Progress was founded in 2006 to promote peer support as a key part of health, health care, and prevention around the world. The mission of Peers for Progress is to accelerate the availability of best practices in peer support around the world. Peers for Progress is designed to demonstrate the value of peer support, extend the evidence base for such interventions, help establish peer support as an accepted, core component of health care, and promote peer support programs and networks around the world.

To accomplish its goals, Peers for Progress began by addressing the growing global diabetes epidemic through a variety of activities, including evaluation and demonstration grants that build and apply the evidence base for peer support in diabetes, promoting peer support programs, and hosting a global web page to circulate program materials and curricula. Peers for Progress is continually expanding a global network of peer support organizations to address the needs of various chronic diseases, health risks, and other conditions that require ongoing health care and sustained behavior change, including but not limited to heart diseases and mental health challenges and illness.

If you are interested in using peer support or have been involved with a peer support program, we encourage you to connect with colleagues in other peer support initiatives by joining the Peers for Progress network.
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By Manuela McDonough and Janet Hernández
Acknowledgments

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Introduction

Identifying the Problem and Peer Support as a Potential Solution

The human and financial toll of health problems on patients, their families, and society in the United States is enormous. Total health care spending in this country is expected to reach $4.8 trillion, or about 20% of gross domestic product, in 2021, despite the implementation of the Affordable Care Act.1 As the population grows older and more Americans develop chronic health conditions, it is imperative to implement proven, cost-effective strategies that help people lead healthier lives.

Fortunately, the peer support model has been shown to play an influential role in health and the health care delivery system.2-5 Peer supporters occupy diverse roles in clinical and community settings that aim to promote health and prevent diseases. As trusted members of their communities, peer supporters “serve as a liaison, link, or intermediary between health/social services and the community to facilitate access to services and improve the quality and cultural competence of service delivery.”6 Depending on their primary responsibilities and the context in which they work, peer supporters may be recognized by different names such as peer leaders, community health workers, lay health advisors, or promotores de salud. Oftentimes, peer supporters have either a shared disease diagnosis or a demographic resemblance to those they serve, such as a similar linguistic or cultural background or residence in the same neighborhood.7

Peer supporters are particularly effective in reaching special audiences, such as racial, ethnic, rural, immigrant, and other underserved populations, and engaging them in health promotion services and programs. With unique insight into their community’s cultural and social influences, peer supporters can address specific barriers that prevent individuals from managing their health conditions and accessing health services. They can serve as a bridge between underserved groups and resources in the community as they identify and cater to the specific needs of their audience and make appropriate referrals to additional resources.8

Peer support can also be a source of culturally and linguistically appropriate emotional, social, and practical assistance toward achieving and sustaining complex health behaviors. It helps people cope with the stressors that accompany chronic disease problems and get the care they need. In addition, peer supporters may provide important feedback and insider knowledge to clinical teams and program administrators about how to tailor patient care and support in a specific community.9 This linkage is critical because many physicians do not have the time to assess all of the barriers that may hinder an individual’s disease management.

Reviews of peer support interventions have found benefits across a variety of health challenges (e.g., promoting breastfeeding,
adherence to antiretroviral therapy for HIV/AIDS) and modalities (e.g., telephone support, online support). The cost-effectiveness of these interventions is emerging in a growing literature. Additionally, there are a large number of peer support programs worldwide.

A recent chapter in the 2014 Annual Review of Public Health identified the contributions of community health workers to basic health needs (e.g., reducing childhood malnutrition) in low-income countries, primary care and health promotion in middle-income countries, and disease management in the United States and other countries with developed economies.

Thus, the need to expand funding and sustain these proven peer support programs is more evident than ever before. NCLR and Peers for Progress believe that peer support is an essential component of bringing culturally competent health care to disenfranchised communities.

This tool kit was designed to help promotores de salud, community health workers, lay health advisors, and other peer supporters harness their individual and collective voices to educate decision-makers about the successes they’ve had in helping Americans become healthier. It contains resources and tips that are designed to guide peer supporters through the steps of advocating effectively on behalf of their communities. It also contains a number of templates and examples that can be adapted to reflect specific priorities and interests.

Only by engaging the grassroots will we be able to effect policy change that is reflective of the needs of the peer support community.

We hope you find this tool kit useful, whether you are continuing an existing effort or embarking on a new journey!
Advocacy

What Is Advocacy and Why Is It Important?

“Advocacy represents the strategies devised, actions taken, and solutions proposed to influence decision-making at the local and state levels to create positive change for people and their environment.”*

Empowering the community to engage in advocacy efforts may include:

• Educating constituencies on political power structures and how they can influence them (helping people understand their role in changing/building power)
• Informing constituencies about specific public policy issues
• Engaging clients in the organization’s advocacy efforts
• Prioritizing advocacy issues to match the capacity and interest of the organization

Examples of Advocacy

• Testifying at public hearings
• Organizing a rally
• Holding a press conference
• Writing a letter to the editor
• Putting on an issue forum

What Is Lobbying?

• “…a focused form of advocacy that shapes public policy in arenas of influence at the local, national, or global level.”†
• “…a specific, legally defined activity that involves stating your position on specific legislation to legislators and/or asking them to support your position. Lobbying is classified as direct or grassroots.”‡

Lobbying is actively supporting or opposing specific legislation (at the local, state, or federal levels) or a rule change in a governmental program (e.g., Medicaid). Nonprofit organizations are within legal parameters to engage in lobbying activities so long as they abide by lobbying rules and restrictions.

Why Lobby?

1. You can make a difference.
2. You can affect legislation.
3. You can participate in a democratic tradition.
4. You can find real solutions.
5. Lobbying is easy.
6. Policymakers need your expertise.
7. You can help others.
8. The views of local nonprofits are important.
9. Lobbying advances your cause.
10. Lobbying builds public trust.

Identifying and Building Coalitions

What Is a Coalition?*

Coalitions are groups of independent organizations that join together for information-sharing, advocacy, or other cooperative activities ranging from research to service delivery. They are an increasingly important vehicle for accomplishing positive community change. The most powerful effort that today’s advocates can undertake to effect change is to build a coalition of people and groups in their communities who are sympathetic to their point of view. By approaching, and then convincing, potential partners to join together to work for a common goal, the advocates gain a coalition whose combined strength will provide them with greater opportunities to reach out and spread their message to the public.

Once you choose the issue to work on, your organization should begin to survey the landscape to 1) identify a coalition already working on this issue and determine how to engage that coalition or 2) build a coalition. When elected officials discover that a coalition of people they serve has joined together for a common goal, they will have to give the group more attention; therefore, the group has a greater chance of making an impact and influencing public policy decisions.

Joining or Collaborating with an Existing Coalition

- Identify coalitions that work on your issues.
- Determine if the coalition shares your organization’s goals and vision for the particular issue.
- Identify the added value your organization brings to the table.

Why Form a Coalition?

Coalitions are typically formed to increase influence and build political power, or to meet one or more of the following needs:

- To accomplish a specific advocacy goal, where the efforts of individual advocacy agencies are likely to be less effective than a unified community voice in support of or opposition to a particular policy, program, or action
- To share information or ideas so that all coalition members are better informed about important issues or programs, such as new proposals to force state and local police to enforce federal immigration laws
- To decrease isolation and increase collaboration, enabling organizations that cannot easily carry out specific activities by themselves to participate indirectly through the coalition’s activities
- To reduce staff and other costs for accomplishing a common goal by sharing work and responsibilities

The effectiveness of a coalition depends to a considerable degree on the organizational skills, commitment, interest, and contributions of time and effort of its members. Even fully staffed, coalitions are rarely effective unless they are bound by commitment, shared interests, and priorities sufficient enough to ensure ongoing participation by a significant portion of its members. A coalition is likely to survive if it proves effective enough that there is a positive return on the time and other resources invested. Thus, a coalition that successfully supports or opposes legislation or regulations, or accomplishes other agreed-upon objectives, is likely to survive and grow.

**Characteristics of Effective Coalitions***

1. **Clearly defined purpose and scope.** Goals, objectives, and strategies are made clear and understandable. The coalition does not try to do everything; instead, it has a clear focus. The coalition may suffer or become ineffective if some members wish to broaden the scope to include other issues.

2. **Coordination.** Legislators need to repeatedly hear from many groups, but when time and resources are limited, a “divide and conquer” strategy may work better than focusing everyone on the same lawmaker. Divide up responsibilities rather than have everyone contact the same people. Additionally, coalition members should share resources such as legislative alerts, newsletters, and other advocacy materials.

3. **Networking.** While you may not know anyone who can get your senators on the phone, perhaps one of your coalition partners does. If you are working together, this contact can speak for the entire coalition (if everyone agrees) rather than just for one group.

4. **Unified messaging.** Typically, coalitions do not take positions that are bound to be divisive because they pit the interests of some coalition members against each other.

5. **Cooperation.** Visit legislators as a coalition to demonstrate a “united front.” When appropriate, you may also want to draft a coalition letter that each member or organization signs.

6. **Expansion.** Continually seek out other groups who share the coalition’s concerns and positions on the issues. Encourage them to join your coalition.

7. **Resource allocation.** One group cannot do all the work or supply all of the resources. Allow groups with limited financial resources to make in-kind contributions.

As you can see, there are many good reasons to start or join a coalition. Coalitions give advocates greater collective power because there is strength in numbers!

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* Ibid.
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Conducting a Power Analysis*

Knowing who has the power to create the change you seek will make your work not only easier but also more successful! There is a variety of players in the peer support realm, including policymakers, state and local agency leaders, community leaders, and parents. Depending on the specific issue you are tackling, your advocacy could target any of these individuals. Conducting a power analysis will help you understand how these actors work together, who has power, and who will put you on track for a definite victory.

The two questions guiding a power analysis are:

- Who has the power to make the decision you need to change the situation? This is the primary target.
- Who can influence the primary target? This is the secondary target.

You will also want to consider:

- How do we influence the decision-maker?
  - This may require conducting research, talking to people who know the person, and identifying their strengths and vulnerabilities.
  - If they are an elected official, did your constituency vote for them?

- What are the other points of influence?
  - Who are your friends and allies?
  - Who are the decision-maker’s friends and allies?
  - Who are your enemies?

- Who are the decision-maker’s enemies?
- Who else cares about this issue? Think beyond your friends and community.
- Who else can you work in coalition with on this issue?

Our personal stories can be a powerful tool of persuasion and motivation in our advocacy work. By bringing personal stories into our meetings with legislators and their staff, we help them connect to an issue emotionally and relate their legislative decisions to deeper personal values and experience. For legislators and staffers who meet with hundreds of constituents on a monthly basis, a powerful personal story has the potential to stand out from the “noise” and leave a lasting impact. Stories also motivate and reenergize our own base to continue our important advocacy work.

The effective use of personal stories requires careful thought and preparation. Here are some tips for developing and preparing powerful stories for your in-district visit with your legislator:

1. Keep it short—in the range of two to three minutes. A story does not have to be long to be powerful. Distill your story down to the essential details.

2. Write out your story in advance and practice. Seek feedback from a family member or friend. This is the best way to ensure that your story is concise and memorable.

3. Avoid using overly general language or trying to say too much when telling your story. Find one particular experience or anecdote that is powerful and bring your listener into that moment. For example, if you are advocating for foreclosure issues, instead of saying:

   \[\text{When we lost our house, we faced great difficulties and hardships, and had to move several times.}\]

   Say:

   \[\text{When we lost our house, we moved to a small apartment and my daughter had to share a bed with her mother. One night she started crying uncontrollably, saying, “Why did we leave the house? I want to go back. I want my room again. Why do I have to sleep with mommy?” I am here today so that no father and no little girl will have to feel like we did that day.}\]

4. Sharing personal stories of clients, family members, or friends can also be effective.

5. Know your legislator. Do a power analysis of your legislator in advance to understand where he or she stands on the issues for which you are advocating. Tailor your story strategically toward your legislator’s self-interests. For example, if you know that your legislator is religious, reference your own faith and religious values in your story.

6. If you don’t feel comfortable sharing your story, keep your story anonymous. Be strategic about how and when you employ stories in your advocacy work.

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Story Preparation Worksheet

1) What dreams do you have for yourself or your family? What hopes and aspirations do you have for your children?

2) How have current difficulties with your health or health care affected you and your family? Describe one hardship or challenge as an example.

3) Why do you want Congress to take action on your priority issue? How will meaningful reform on this issue impact you personally and help you and your family achieve your goals and dreams?

4) How will the reforms that we are seeking benefit all Americans and the country as a whole?
Meeting with Legislators

Holding an In-District Meeting with Your Legislator

Now that you have your story prepared, the next step is setting up a meeting with your legislator. Meeting with legislators and other policymakers is an important part of the advocacy experience. This section provides information and tips for arranging meetings, holding meetings, and following up after meetings.

**Arranging the Meeting**

To request a meeting, you should first get the contact information for the office’s scheduler. Call the legislator’s home district office (not the Washington, DC, office) and ask for the scheduler’s name, telephone number, and email address. Email a written request to the scheduler. Follow up with a phone call to confirm that the request has been received. See Appendix A for a sample letter.

**Preparing for the Meeting**

- Do your homework. Know exactly what you want to say and carefully review your message.
- Before your visit, establish clear roles each group member will play:
  - Group leader—opens meeting, introduces group and issues to be discussed, manages agenda and discussion
  - Person to present your priority issue(s) and explain why it is important to our community
  - Storyteller(s)—people to tell stories that relate to your issues
  - “Pinner”—makes the ask for specific actions in support of your priority policy issue
  - Timekeeper
  - Note-taker
  - Point of contact for follow-up efforts with congressional offices
- If possible, compile information about the impact of specific issues on the legislator’s district/state. However, do not compile a long list of statistics; your elected officials will not remember them and they will lose their impact. Prepare a few dramatic numbers or anecdotes to illustrate your points. Collect recent local news articles that illustrate the issue. As with most people, it is easier for legislators to remember examples conveyed in human and personal terms.
- To encourage legislators to support your positions, present materials that clearly articulate your views, using specific case examples when possible.
- Know the counterarguments and be ready to respectfully answer any questions or disagreements.
- Make sure everyone in your group is prepared. Brief everyone attending the meeting prior to the meeting and make sure they have any written materials (biographical profile of legislators and their views, etc.) to review well ahead of time.
- Be organized. Agree ahead of time on the role each participant will take, who discusses what, and in what order participants will speak.
- If you are going as part of a larger coalition, meet ahead of time. It is
unwise to have an internal debate or conversation in front of your elected official. Be certain everyone agrees on your group’s central message and what you want to ask the legislator to do for you.

- Prepare a packet to leave with your legislator which could include background information, fact sheets, and/or newspaper clippings. Attach your card to the packet.

Making the Presentation

- Be on time!
- Have the moderator explain to the legislator/staffer why you asked for the meeting.
- Then have everyone introduce themselves and be sure to include your organization’s name and which part of the state you are from.
- Present your concerns simply and directly. Get to your “bottom line” immediately. Be brief, direct, courteous, and positive. When presenting each issue, do not assume that your legislator has any prior knowledge of the subject. Presentation of each topic roughly should follow this outline:
  1. Background: Explain the issue in the simplest possible terms.
  2. Impact: Explain how the issue directly affects your community or the group you represent.
  3. Recommendation: Indicate what you would like your legislator to do.
- Tell powerful stories. Stories are one of the most effective ways to leave a lasting impact on legislators and congressional staff. A powerful story creates an emotional connection to an issue and links it to deeper values and personal experience.
- Be polite and positive, not confrontational. Present your information in a friendly manner. Do not get into arguments. Remember, you are meeting with the member or staff person to inform him/her about your positions on issues.
- If you do not know the answer to a question, admit it and promise to get back with the answer. Be sure to follow up with your answer as quickly as possible after the meeting.
- Listen well. Make sure you do not do all of the talking. Much of lobbying is listening, looking for indications of the legislator’s views, and finding opportunities to provide good information. Give your legislator opportunities to ask questions or state his or her opinion. Members and staff will appreciate the chance to be heard. Also ask questions.
- Stay away from jargon and acronyms. Remember that your legislator deals with dozens, if not hundreds, of issues each week, each with its own “language.”
- Thank your legislators if they have been supportive. They get thanked far less than they get criticized. They will appreciate your recognition.

Sample Introduction to Legislator or Staff Member

Hello Mr./Ms. __________. I’d like to first thank you for taking the time to meet with us today. My name is _____________. Our group has come from [location]. We come from different organizations, but together we represent an important voice in your district. During our time with you today, we’d like to discuss our concerns about [issues].
Following Up with Your Legislator*

The most valuable thing to come out of your visit is a new relationship with a member of Congress or a congressional staffer. Developing these relationships can raise the profile of your organization and increase the amount of impact you have on both local and national policy debates.

You and your organization should consider some of these follow-up steps:

- Send a brief thank you note to the member or staff person for meeting with you (see Appendix B for a sample). Briefly summarize the main points of the meeting.
- Remember to follow up with responses to questions the member or staff person asked but you could not answer at the time.
- Keep in touch. Do not think of the meeting as an isolated event. Although you may not have a face-to-face meeting again for some time, invite your elected officials to speak at an event or meeting. Think of other ways to maintain the relationship you have initiated. Some ideas might include the following:
  - Contact your member of Congress when an important bill that affects your community needs his or her attention. You can stay updated on issues affecting the Latino community by signing up for NCLR action alerts at www.nclr.org.
  - Invite your member of Congress to attend or speak at an event you hold in his or her district. This could be an opportunity to demonstrate that what you do directly impacts the member’s constituents. If you are a direct-service organization, you may want to invite the member to your facilities to view your operations and witness your impact firsthand.
  - Speak to the member’s district staff to find out if there are opportunities for your organization to partner with the congressperson on setting up a town hall meeting that focuses on the issues most important to your organization.
  - If your organization is profiled in a local or national newspaper, send a clipping of the story to your congressperson’s office, letting him or her know that you are interested in his or her opinion on the issue covered in the article. This is another way to engage congressional offices and remind your member of Congress that you are an important newsmaker in his or her district.
  - Report back. These reports are invaluable in developing legislative strategies and tracking members’ positions on issues important to your community. Please fill out the following Legislative Visit Report.

Legislative Visit Report

This form will help us keep track of the progress made on issues addressed during legislative visits. Please fill it out immediately after your meeting(s) and return it to NCLR at mmcdonough@nclr.org.

State: ________________________________________________________________

Organizations: _______________________________________________________

Member Visited/Congressional Staff Present: ________________________________

Issues Discussed (Check all that apply)

☐ Peer Support
☐ Health
☐ Immigration
☐ Equality and Economic Opportunity
☐ LGBT Individuals

Other: ________________________________________________________________

Did the member of Congress or staffer make any specific commitments to take action on the issue(s)?

What follow-up actions does your organization need to take? What follow-up actions should NCLR take?
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Using Social Media to Strengthen Your Advocacy*

Social media is a powerful tool that enables you to spread the word about your advocacy. The following guide outlines activities for engaging your expanded social networks, even if your friends and family can’t be with you during your in-district visits.

**Twitter**

Tweet about your experience! Including a hashtag in your tweet is a great way to make your message easy to find and part of an existing conversation.

- Hashtags for peer support:
  - #peersupport, #CHWs, #promotores
- Follow @NCLR and @Peers4Progress

**Instagram and Photo**

- Post photos of your experience using #peersupport on Instagram.
- NCLR and Peers for Progress will pull some of the photos and use them on the NCLR and Peers for Progress blogs and Facebook pages.

**Facebook**

- NCLR updates its Facebook page with photos and messages from our advocacy events. Go to www.facebook.com/Nationalcounciloflaraza to “Like” our page and then let us know what advocacy means to you.
- NCLR posts photos and videos, and you might just find yourself on our page. If you do, be sure to tag the photo with your info!
- Your Facebook friends can reach their members of Congress directly from the NCLR Action Fund’s Facebook page with our Call Congress tool. Simply enter your cell phone number and you will receive a call that will patch you through to Congress. Make sure you share the tool with your friends through www.facebook.com/NCLRActionFund!

* Ibid.
Appendix A: Sample Letter of Request for an In-District Meeting*

[LETTERHEAD]

[Date]

The Honorable [First and Last Name]
[Address]
[Address]

Dear [Representative/Senator] [Last Name]:

I am one of your constituents and am writing to request an in-district meeting. Other members of my community and I would like to speak with you about Net Neutrality and the future of the open Internet. Earlier this year, the U.S. Court of Appeals in Washington, DC, struck down the Federal Communications Commission’s (FCC) Open Internet Order. As it stands now, Internet service providers are free to block or degrade service to any website or application they want.

We would like to speak with you about these recent developments. Specifically, we would like to address the issue of FCC authority and the effort to reclassify broadband under Title II of the Communications Act.

The future of the Internet impacts everyone. Such a conversation is essential to the future of our democracy and is of critical importance to your constituents.

We are available to meet with you in your [City] office on [Date] or [Date] at your convenience. If you are unavailable on both of these dates, we would be happy to work with your office to schedule another time to meet.

Please let me know what would work best for you. My contact information follows below.

Thank you for your time. I look forward to hearing from you.

Sincerely,

[HANDWRITTEN SIGNATURE]

[Your Name]
[Phone Number]
[Email Address]

Appendix B: Sample Thank You Letter

[LETTERHEAD]

[Date]
The Honorable [First and Last Name]
[Address]
[Address]

Dear [Representative/Senator] [Last Name]:

On behalf of [Name of organization], thank you for welcoming us, along with other members of our state delegation, to your state office on [Date]. [Name of organization] was happy to have shared our views with you and your staff.

[Name of organization] would like to stay in contact with you and your staff as Congress works to achieve [mention issue priorities discussed in your meeting]. [This is where you can reaffirm support for a particular policy position and restate the request for action or “ask” you made during the meeting. This is also where you can provide information that may have been promised in your meeting or request a follow-up meeting in your district.]

Thank you again for your time.

Sincerely,

[Name of individual]
[Title]
Appendix C: Additional Resources for Advocates

American Public Health Association (APHA)
www.apha.org

Center for Community Change
www.communitychange.org

Congress.gov
http://congress.gov

Congress.org
www.congress.org

Internal Revenue Service (IRS)
www.irs.gov/charities

Mexican American Legal Defense and Educational Fund (MALDEF)
http://maldef.org

National Association of Latino Elected and Appointed Officials (NALEO)
www.naleo.org

National Immigration Law Center
www.nilc.org

NCLR
www.nclr.org

Peers for Progress
http://peersforprogress.org

Pew Hispanic Center
www.pewhispanic.org

Project Vote Smart
www.votesmart.org
Endnotes


