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VIRTUAL ADVOCACY TOOLKIT

PREPARING TO ADVOCATE IN A VIRTUAL WORLD

Advocating for your organization's goals in this new virtual environment can be extremely challenging, especially when it comes to planning and executing events that require the coordination of many moving parts.

With this in mind, the Coalition for Health Funding staff created this slide deck to provide tips on preparing for your virtual advocacy day, virtual briefing, and other advocacy efforts during the ongoing COVID-19 pandemic crisis.

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THIS TOOLKIT INCLUDES TIPS ON:

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SELECTING THE APPROPRIATE VIRTUAL PLATFORM

In this completely virtual environment, being able to connect is imperative, and selecting the wrong virtual platform can easily spell disaster for your Advocacy Day, meeting, or online event.

The following slides aim to provide a few tips on selecting the appropriate virtual platform that will enable your host, panelists, and participants to get the most out of your advocacy effort.

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SELECTING THE APPROPRIATE VIRTUAL PLATFORM

Pick the virtual platform that won't prohibit participation.

- Is your target audience able to use that platform? Generally, Microsoft Teams, Zoom, and WebEx are widely accepted on the Hill, but restricted platforms vary by congressional office. Some platforms require a log in or account, which could limit participation.

- Feel free to contact your virtual platform's sales representative to discuss your needs and make sure you pick a platform and package that gives you the ability to meet your goals.

- When possible, arrange a check-in meeting with any presenters using the virtual platform to make sure they are on a computer with a sufficient camera and microphone that will not prohibit their participation.

Click here for TechFunnel's list of reputable virtual platforms

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SELECTING THE APPROPRIATE VIRTUAL PLATFORM

Choose a platform that will enable you to perform all of your desired functions.

- Will there be slides? Set-up Options: Webinar vs. Meeting

  - A webinar option will allow the viewer's screen to feature slides, with a small box in the upper right corner showing the speaker.

  - The meeting option usually does not allow the split screen function, although panelists can still share their screen to all participants—it is more complicated to view the speakers simultaneously in this setting.

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SELECTING THE APPROPRIATE VIRTUAL PLATFORM

Chose a platform that will enable you to perform all of your desired functions (cont'd).

- Are You Livestreaming Your Event? There several reputable virtual conference platforms that allow you to livestream your meeting or event through your organization's social media outlets, (i.e. Facebook Live and YouTube Live) including:

  - Cisco's WebEx platform

  - Zoom Webinar

  - BrandLive

  - Click here for a more detailed list

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SELECTING THE APPROPRIATE VIRTUAL PLATFORM

Setting Up Your Event

- Create your event and send calendar invites to the appropriate hosts, panelists, and viewers.
    - Note the appropriate time zone for your event.
    - Indicate whether you want the participants to be muted automatically; give video/voice capabilities to those who should have it.
    - Check whether you have the ability to record.

Practice Makes Perfect

- Hold a test run on your chosen platform to familiarize yourself with all its functions and capabilities.

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PLANNING & CONDUCTING VIRTUAL ADVOCACY DAYS

Advocating for your organization's goals in this virtual environment can be extremely challenging, especially when it comes to planning and executing events that require the coordination of many moving parts and cooperation of many different people.

The following slides offer a few tips on preparing for your virtual Advocacy Day during the ongoing COVID-19 pandemic crisis.

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PLANNING & CONDUCTING VIRTUAL ADVOCACY DAYS

Scheduling

- Keep in mind, your members might not be able to devote a whole day to advocacy if they are doing it from home and may need to work around their day job!

- To decrease the number of email exchanges between your scheduling team, your members advocates, and the relevant congressional offices, we suggest first collecting your advocates' availability and housing them on a spreadsheet.

- This spreadsheet should also include other scheduling data, such as:

  - The appropriate time zones for each advocate

  - The login information for the specific meeting

  - Congressional staff contact information

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PLANNING & CONDUCTING VIRTUAL ADVOCACY DAYS

Preparing your advocates

- Advocates are more likely to be nervous about holding congressional meetings virtually. Schedule a webinar with your member advocates ahead of their Advocacy Day meetings—we recommend about a week out from your advocacy day. The preliminary webinar will ensure that they have the ability to connect to your selected virtual platform.

- This also gives you an opportunity to review key guidance on:

  - Dress code and etiquette

  - Acceptable backgrounds, laptop angles, and lighting setup

  - Reminders that people can see you as long as your camera is turned on and to mute yourself after you're done speaking for those doing video meetings.

  - Talking points with space for advocates to insert their brief personal story

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PLANNING & CONDUCTING VIRTUAL ADVOCACY DAYS

Finalize meeting times

- Send calendar invites to Hill staff, and be sure to include:
  - Login link and password for the virtual platform, or the dial-in number for meetings that held by phone
  - A reminder to join 5 minutes before the start time to resolve any connectivity issues
  - A finalized agenda with relevant background documents
  - A point of contact in your office who can field technical difficulty questions

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PLANNING & CONDUCTING VIRTUAL BRIEFINGS

The following slides offer a few tips on preparing for your virtual congressional briefing during the ongoing COVID-19 pandemic crisis.

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PLANNING & CONDUCTING VIRTUAL BRIEFINGS

Planning

- Set up a preliminary virtual meeting with your moderator and panelists.

- Discuss any connectivity issues your panelists are having

- Review the virtual platform functions your panelists are expected to use, including the Q&A function

- Review key guidance on:

  - Dress code and etiquette

  - Acceptable backgrounds, laptop angles, and lighting setup

  - Reminders that people can see you as long as your camera is turned on and to mute yourself after you're done speaking for those doing video meetings

- Brainstorm the content, flow, and order of presentations for your event.

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PLANNING & CONDUCTING VIRTUAL BRIEFINGS

Send Your Panelists and Participants the Correct Calendar Invites

- Log in links are different for participants and moderators: moderators and panelists must be viewable and audible event while all participants have camera and microphone functions restricted.

- In you panelists' calendar invites, include:

    - instructions to join the event 15 minutes before the start time

    - a finalized run of show and any relevant background documents

    - a point of contact in your office in case anyone has technical difficulties along the way

    - notes on meeting etiquette

- Send your moderator a draft script that includes opening remarks, introductory notes on each speaker, closing remarks, and a few questions for the guest speaker—in case crowd participation is lacking during Q&A.

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PLANNING & CONDUCTING VIRTUAL BRIEFINGS

Promote your briefing through our daily CHF Member Update and online

- To have your briefing included in our daily Member Update, send a draft blurb to David Eaton at Deaton@dc-crd.com and Lindsey Trischler at Ltrischler@dc-crd.com.

- To have your briefing also included on the Hill Happenings website – a non-CHF website which congressional staff often use as a daily guide to congressional briefings – send your draft description blurb to submit@hillhappenings.com.

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SOCIAL MEDIA ADVOCACY

Social media is always a critical advocacy tool, yet its role in supporting successful advocacy campaigns has only grown during the time we have been unable to advocate in person.

We invite your organization use the following social media tools and messages to help drive interest in public health priorities and to amplify the general need for increased federal investments in public health.

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SOCIAL MEDIA ADVOCACY

Sample Twitter / Facebook Posts

- Invest in [***INSERT ORGANIZATION'S FUNDING PRIORITY***]. Please remember [***INSERT TARGETED MOC's TWITTER HANDLE***] it is critically important to #FundHealth.

- [***INSERT PUBLIC HEALTH FACT***]. That's why [***INSERT ORGANIZATION TWITTER HANDLE***] is working to stress the importance of investing in [***INSERT ORGANIZATION'S FUNDING PRIORITY***]. #FundHealth

- Retweet if you agree that Congress should #FundHealth and make [***INSERT ORGANIZATION'S FUNDING PRIORITY***] a priority in 2021. #FundHealth

- Today, join us in telling Congress they must act now to #FundHealth. Health research and public health initiatives work to protect and enhance the lives of all Americans, including [***INSERT ORGANIZATION'S KEY CONSTITUENCY***]. #FundHealth

#FundHealth

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SOCIAL MEDIA ADVOCACY

Twitter Directories

- House and Senate Twitter Directory

Feel free to tag the Coalition for Health Funding social media outlets:

- CHF Twitter
- CHF Instagram
- CHF Facebook

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TRADITIONAL COMMUNICATIONS

Traditional communications, such as direct emails and phone calls, are still important. Most congressional offices are teleworking through fall 2020, but voicemails to the offices are still being collected and reviewed remotely by congressional staff.

The following slides include district office directories for all Members of Congress, and also some content for your public health funding-related member outreach efforts during the pandemic.

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TRADITIONAL COMMUNICATIONS

District office directories

All House district office addresses and phone numbers

All Senate district office addresses and phone numbers

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TRADITIONAL COMMUNICATIONS

Sample content for talking points and member outreach emails on public health funding:

- We believe to truly improve health, you need a strong and sustained investment across the agencies and programs of the public health continuum.

- For example, investments in medical research are important, but if we don't have health professionals to treat patients, if we don't help people lead a good quality of life, if we don't help prevent people from getting sick in the first place, we're falling short on the promise to protect Americans and improve health.

- Please urge your fellow Members of Congress to quickly and responsibly pass the Fiscal Year 2021 spending bills and to avoid another costly short-term resolution, or even worse, another government shutdown.

[Click here](#) **to visit CHF's Advocacy webpage, which hosts talking points for our latest public health funding-related campaigns.**

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ADDITIONAL RESOURCES

For additional resources on virtual advocacy, please see the following publications

- Blog: "How to Lobby Effectively When You Can't Be in the Room Where It Happens," by Mila Becker, Chief Policy Officer, Endocrine Society/ CHF Board Member.

- Virtual Advocacy Guide from the Academy for Radiology & Biomedical Imaging Research (CHF member).

If you would like to have your organization's advocacy guide, blog, or vlog added to our list, please email David Eaton at Deaton@dc-crd.com or Lindsey Trischler at Ltrischler@dc-crd.com.

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CHF STAFF CONTACT INFORMATION

Please feel free to reach out to our CHF staff

- If you have questions or suggestions about the content of this slide deck, please contact David Eaton at Deaton@dc-crd.com or Lindsey Trischler at Ltrischler@dc-crd.com.

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