

NCPHLL LEADERSHIP FORUM SERIES: ADVOCACY | APRIL 12-13, 2012, ST. PAUL, MINNESOTA

The Association of Public Health Laboratories (APHL), through the National Center for Public Health Laboratory Leadership (NCPHLL), convened a meeting focused on building the advocacy skills within the public health laboratory (PHL) community. The purpose of the meeting was to identify:

- Methods to promote the PHL to stakeholders and partners;
- Approaches to legislative advocacy;
- Advocacy-related roles for PHL staff;
- Skills and tools for effective messaging to stakeholders, legislators, and key partners (e.g., other associations such as the American Public Health Association).

WHY ADVOCACY IS IMPORTANT: PERSPECTIVES FROM THE FIELD

New laws can have a profound impact on the work of PHLs. Some bills can be anticipated, others surface unexpectedly. Bills are often drafted without the input of the PHL and can include stipulations that can prevent the PHL from fulfilling its mission (e.g., are contrary to CLIA regulations). Debates are often emotionally charged and do not necessarily reflect an understanding of the PHL's activities and existing requirements. Strong relationships with legislative liaisons can help PHLs stay informed about pending legislation. Tracking legislation should be a priority. As one participant put it, "It is much easier to start with your own bill than to fix another bill or law."

Minnesota: By law, all babies must be screened for heritable and congenital disorders. Until recently, residual bloodspot cards and screening data were retained indefinitely and used for quality improvement and new method development. Parents had the right to opt-out of the screening storage and/or use the samples. In 2006, a bill was introduced requiring informed consent for the collection of genetic material. The bill was passed into law and has since been upheld in court challenges. Since then, the PHL has been complying with the statute but the health department is working to reverse the law.

Texas: There have been various bills related to newborn screening. For example, a 2011 bill required a change from the opt-out process to an opt-in process for residual specimen storage and use. The PHL has been making an effort to educate legislators about the issue and the lab's work.

Iowa: Legislation related to raw milk has been repeatedly introduced in various committees. The PHL has worked with stakeholders, such as the Dairy Association, to inform legislators about the issue.

Maryland: The PHL has a long history of involvement in the legislative process. From regulation of physician office laboratories to newborn screenings conducted by private labs, the PHL has been able to successfully promote legislation that allows it to fulfill its mission.

CONTEXT

PHLs—at the state and local level—analyze public health threats, provide the answers needed to mount an effective response, and act to protect the public in collaboration with other decision makers. Unlike private medical laboratories that perform tests to diagnose illnesses and conditions afflicting individual patients, PHLs safeguard entire communities. PHLs provide essential services such as newborn screenings, infectious disease control, food and water safety, and emergency/bioterrorism preparedness. To ensure the accuracy and readiness of these services, PHLs are subject to a significant amount of regulation. Federal funding also includes specific mandates. However, policymakers are often unaware of or do not understand the work of PHLs and pass legislation that prevents PHLs from accomplishing their mission of protecting the health of the community.

Many important stakeholders lack an understanding of the work of PHLs—their work is often behind the scenes. Participants reported that the work of the PHL is often “invisible” to other stakeholders. Others in the public health community sometimes do not see the laboratory as an equal partner in research and service provision. Elected officials may adopt legislation that undermines the ability of a PHL to fulfill its mission. PHLs need to do a better job of conveying the importance of the work they do—they need to become better advocates.

CHALLENGES TO GREATER VISIBILITY

If you asked laboratorians to describe the critical elements of their job, advocacy and public relations would not be anywhere near the top of the list, if they make the list at all. Participants reported that as scientists, laboratorians do not receive training in advocacy as do many of their public health colleagues (e.g., social workers). According to participants, PHLs lack the tools and experience to effectively tell their story.

As part of the public health infrastructure, PHLs function within a bureaucracy and must follow specific rules related to communication and advocacy—often working through legislative liaisons and public information/communication offices. Participants reported regularly responding to requests for information. However, they rarely, if at all, directly contact policymakers on important issues.

Increasing Visibility at the National Level

APHL works at the national level to build awareness about the work of PHLs.

- *Educational Materials*: Factsheets and other materials help APHL tell the PHL story.
- *APHL Hill Day*: Brings laboratorians to Capitol Hill to build relationships with policymakers.
- *Laboratory Efficiencies Initiative (LEI)*: This APHL/CDC partnership supports the development of a sustainable public health laboratory system in the United States. The LEI is designed to help PHLs fully implement and maintain efficient management practices, which are the foundations of a strong platform for current and future test services.
- *Member Resource Center*: Allows APHL members to share best practices.

BUILDING RELATIONSHIPS INCREASES VISIBILITY

While it is important to know the nuts and bolts of the legislative process—both at the federal and state level—effective advocacy depends on strong relationships. This is especially important for PHLs since there is a general lack of awareness about the work done by laboratories. PHLs need to position themselves as key sources of information. How does this happen? It happens by becoming a credible and dependable source of information for key stakeholders.

It can take some work to establish the PHL as a source of information. Once again, this comes down to relationships. PHLs can cultivate relationships with those that regularly interact with policymakers and the media and educate them on key issues. If stakeholders do not know the answer to a question, they may defer to the PHL—allowing the PHL to tell its story.

In terms of advocacy and visibility, there are some key stakeholders with which PHLs need to establish relationships. These stakeholders can help carry critical messages. It is important to make the distinction between those inside the health department and those outside. Different approaches will be required depending on the stakeholder. Participants identified the following key stakeholders that can play a role in advocacy activities.

- State/City/County health officials
- Other divisions within the health department
 - Epidemiology
 - Environmental health
 - Legislative liaisons
 - Public affairs/Communications
- First responders
- Third-party validators (i.e., those that benefit from laboratory services, such as parents)
- Public health community (APHA, ASTHO, NACHO)
- Manufacturers of laboratory equipment and supplies

Participants stressed that interactions should not be focused solely around legislative activities. PHLs should be regularly interacting with key stakeholders about important issues—they can serve as a resource to demystify science, practice, and public health protocols.

GETTING STARTED

Know the Rules

As public employees, there are rules regarding the extent to which laboratory staff can engage in advocacy activities. There are also rules within the health department. In interacting with the media or engaging policymakers, staff is almost always required to work through the legislative liaison and/or communications staff—there is a clear chain of command. It is the job of these people to make sure that a consistent message comes from the department—a message that reflects the position of the department. Learn the processes within your organization.

Do Your Homework

Know what issues have come up in the past and are likely to come up in the future. Develop a strategy and identify the stakeholders you need to engage on specific issues.

Develop a Plan

Effecting change does not happen by chance, it is necessary to plan to make change happen. The plan should answer the following questions.

- What are your goals (i.e., what do you want)?
- What are your public policy priorities?
- How can you achieve your goals (e.g., legislations, through partnerships, etc.)?
- Who are the other stakeholders?
- How to convey your message?
- Who are the messengers (e.g., health department, community advocates, PHL staff, etc.)?
- Do you need a legislative champion (i.e., an ally on the inside)?

Be an Effective Communicator

Effective communication is a skill that can be developed. Effective messaging relies both on the content of the message and the person delivering the message. Both should be considered.

- Be prepared. Know the issues and key messages. Do the “spade work” so you are ready to respond.
- Avoid scientific jargon.
- Maintain integrity—tell the truth.
- Make sure your data/information are accurate.
- Anticipate opposing arguments.
- Know when to be quiet (i.e., when you have said enough).
- Don’t just say something needs to change, explain why it needs to change.
- Link your issue to other priorities.
- Thank people for listening.

ADVOCACY OPPORTUNITIES

Hearings

Hearings are an integral part of the legislative process. Sometimes, they are critical to the legislation under consideration. At other times, they can be political theater—simply done for show.

Hints

- Know the procedural rules.
- Stay on message—don't get sidetracked.
- Do your homework—know the positions of committee members and anticipate their questions.
- Build relationships with the members of key committees. Encourage them to raise important issues during hearings.
- Be prepared to address the fiscal impact of proposed actions.
- If you do not know the answer, offer to provide the information (and follow through).
- Stay calm, even under aggressive questioning. Expect some political posturing to take place.

Laboratory Tours

Tours provide an opportunity to demonstrate what the PHL does on a daily basis. Many PHLs regularly open their facilities for tours. Tours can also be a one-on-one experience designed to educate key individuals.

Hints

- Tell what you are doing and why it is important (don't just spout statistics about how many tests you do each year).
- Carefully select staff that will interact with guests; provide staff with talking points and coaching.
- Create visual props that can help explain the laboratory's work (e.g., a map of service areas).
- Schedule tours when staff will be available (i.e., do not schedule tours during lunch).
- Be sure to take into consideration security and safety issues.

The Importance of Legislative Staff

It is not always necessary to speak directly with the elected official. Cultivating relationships with staffers can be very beneficial. Staff do the leg work for their boss—researching issues, drafting legislation, and aligning stakeholders. Not only can they be an important resource and ally today, you never know where their careers may take them. Today's legislative aide may be a chief of staff in the future and could eventually run for office. Once you build a relationship, making the effort to maintain it can result in a substantial payoff.

Media

PHLs can cultivate members of the media to establish a reputation as a resource on public health issues. Reporters are always in need of background information or someone who can put an issue in context (i.e., explain why it is important). However, it seems that many PHLs miss important opportunities to get their story told. Participants reported that they often are not involved in press conferences, even though it is their data that are being presented. PHLs should work with the health department's public affairs/communications office to raise the laboratories profile with the media. For example, staff from the laboratory should present the data in press conferences. Not only does this increase visibility for the laboratory, it also helps to ensure that the data are accurately reported and that laboratory staff are available to answer questions.

Chance Encounters with Policymakers

Encounters with policymakers can provide an opportunity to educate them about the PHL and important issues. Look for opportunities—as one participant said, “Create lucky accidents.” Since these are “chance” encounters, there will be very little time to convey key messages.

Hints

- Know the key messages.
- Practice your “elevator speech.”
- Be positive. Show enthusiasm about your work.
- Identify yourself as a constituent (if you are).
- Have an “ask” (e.g., invite them to a lab tour).
- Offer to provide more information.

Community and Other Presentations

Developing a “road show” can help PHLs tell their story to diverse audiences. Consider developing a presentation that can be modified depending on the audience (e.g., schools, potential research partners, etc.).

Forums

PHLs can organize forums around specific issues and invite stakeholders to participate. Not only can this serve as a training opportunity for staff but it can also serve to build relationships (e.g., invite policymakers to participate in a panel discussion).

Advocacy in Action

On their way back from the Advocacy Forum, Pandora Ray, NCPHLL Director, and Laura Gillim-Ross, Laboratory Supervisor with the Colorado Department of Public Health and Environment, encountered a State Representative from Colorado in the airport. Laura approached the Congresswoman and engaged her in conversation.

The result?

A promise to visit the PHL for a tour.

ADVOCACY TOOLS

Fact Sheets

Fact sheets are short documents that address a specific issue. They should present background information on the issue and describe the impact of any recommended policy changes.

Hints

- Be concise (short and substantive).
- Focus on “why” the issue is important.
- Address funding (i.e., what is being spent, what is needed).
- Provide sources for additional information.
- Localize information to the extent possible (e.g., by state or district).
- Include stories (i.e., humanize the issue).
- Package information so that it is visually appealing.
- Consider use of new media (e.g., video content, blogs).

Op-Eds/Letters to the Editor

An op-ed or letter to the editor is an opportunity to reach a wider audience, including the general public. It can come from laboratory staff or other stakeholders. Former laboratory staff (e.g., retired staff) have a lot of credibility and can serve as effective messengers but are not subject to the same restrictions as existing staff.

Advisory Councils

Advisory councils can serve as resources to the PHL and can also be effective advocates.

SUPPORTING ADVOCATES: GETTING STAFF INVOLVED

Not just the laboratory director should receive training in advocacy. Staff have a role to play in the process. To become effective advocates for the laboratory, staff need training, which should encompass the message (i.e., what they will say) and communication skills (i.e., how they will say it).

There may be some resistance from staff in terms of their involvement. Many people dislike the partisan, contentious aspects of politics and do not differentiate policy from politics. People are often intimidated because they lack knowledge of the process and hold the belief that one person cannot make a difference. Educating and training staff can help to dispel these beliefs.

Recognition of laboratory staff can also be used as advocacy opportunities. One participant reported that when an employee received the State Employee of the Year Award (the participant nominated the employee), it provided an opportunity to raise the laboratories profile and speak with the Governor about the laboratory.

NEXT STEPS

Participants identified various roles for APHL to support PHLs in their advocacy efforts and in training PHL staff to engage in advocacy activities. Specifically, the Member Resource Center was identified as an appropriate repository for this information.

- Tools to be used during advocacy activities such as model legislation, sample role playing exercises, talking points, and strategic planning templates.
- Tools on how to navigate the health department bureaucracy.
- Tools on how to navigate the state legislative process.
- A list of “hot” issues that PHLs may encounter.

In addition, participants stressed that for future advocacy trainings, participants should be required to do pre-work. They should learn their state system and identify key issues. Forwarding this information to the trainers would allow them to tailor role-playing exercises to relevant issues.

About NCPHLL

APHL’s National Center for Public Health Laboratory Leadership (NCPHLL), created in November 2002, provides laboratory science professionals with resources to help them excel in key leadership positions.

Learn more: <http://www.aphl.org/mycareer/lablead>

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