

Advocacy Event Toolkit

Engaging in Health Policy as a Chapter

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Links to Additional Toolkit Resources

- Chapter Certificate of Insurance for Event Spaces
- Current ONS Strategic Priorities
- Advocacy Support Form



Success Metric: Advocacy Event

This toolkit provides information on the *Advocacy Event* success metric. To complete this metric, your chapter must host or participate in a qualifying advocacy event.

What Is an Advocacy Event?

A qualifying advocacy event is a virtual, in-person, or hybrid event in which ONS members gather with the ultimate goal of educating members and policymakers and influencing public policy. To determine what qualifies as an advocacy event for your chapter, see the Chapter Advocacy Roadmap.

Advocacy events are one way that ONS chapters can engage in public policy issues related to nursing, oncology, and the medical field in general. These events are important because oncology nurses can use their collective voice to influence policy. Hosting an advocacy event allows a chapter to stay up to date on current issues affecting your membership, and shape legislation to improve the future of oncology nursing and cancer care.

ONS Center for Health Policy and Advocacy

Click <u>here</u> for the Center for Advocacy and Health Policy. On this site, you can sign up for health policy alerts, learn about ONS's health policy priorities and agenda, and view available resources.

ONS works with a focused team at Hart Health Strategies, Inc., a bipartisan consulting and lobbying firm specializing in legislative and regulatory healthcare issue advocacy. If you are interested in having a representative attend your event, you can request advocacy support for your program via this form.

Please contact ONS at healthpolicy@ons.org for any questions related to advocacy and policy. Please contact chapters@ons.org for logistical or event-related assistance.



Hosting an Advocacy Event

Pre-Event Checklist

Hold initial organizing meeting (identify planning team, check congressional or state legislature's calendar, identify possible dates, etc.).		
Schedule regular meetings of the planning team (at least two to three months prior to event).		
 Design the overall event plan and budget, which can include: Any venue costs Food or catering costs (if applicable) Handouts, fliers, folders, etc. Signage Chapter merchandise (e.g., embroidered shirts) 		
Notify ONS about your event and your needs. If you would like an advocacy representative, either virtually or in person, <u>submit this form</u> . Please note that if a speaker attends the event in person, the sponsoring chapter(s) are responsible for any travel expense incurred.		
Select and confirm venue. Ensure that your venue has no restrictions on political activity or lobbying.		
Share an event invitation with your chapter members.		
Open member registration and collect the home addresses of attendees to help determine meeting requests with elected officials.		
Identify key legislators and contact schedulers to determine availability (approximately four weeks prior).		
Schedule 15–30-minute meetings with legislators and their staff.		
Post event information and registration link on your chapter site and any chapter social media pages.		
Determine your specific policy requests using the ONS Health Policy Priorities and Agenda.		
Develop the event agenda.		
Invite speakers (if applicable).		
Send reminders to chapter members and neighboring chapters to solicit participation.		
Appoint a photographer. This can be a chapter member or volunteer.		
Assemble folders or packets for legislators and attendees.		



Planning and Venue

Selecting a Date for a State Advocacy Event

Visit your state's legislature webpage to determine when legislative sessions are scheduled. You can typically find this page through an internet search using terms like "Pennsylvania state legislature." Once there, you may need to explore multiple dates to find a suitable time that accommodates legislators, staff, and attendees.

Consider hosting your in-person meeting near the state capital or within its complex, if permitted. This choice will facilitate seamless transitions for your attendees between your meeting venue and their legislative appointments. Moreover, it ensures convenient access for legislators and staff. If you're interested in securing a venue within a capitol complex, connect with a state legislator's staff to explore availability.

If a building in the state capitol is not an option, check with local hospitals or other healthcare facilities for free or discounted space, particularly if any chapter members are employed by the institution. Local libraries and universities may also have free or discounted meeting spaces available. It is always important to ensure beforehand that your venue **does not** have any restrictions on lobbying or political activities.

Contacting Local Officials

- 1. Identify appropriate legislators: Determine who the local legislators are based on your attendee demographics. This includes local, state, and federal officials. You can typically find this information on your state government's website or through nationwide online databases like www.usa.gov/elected-officials.
- 2. Choose your method of contact: You have several options for reaching out:
 - Phone call: This can be the most direct way to speak with someone. Look up their office
 number and call during business hours. You may still need to submit a form to book an
 appointment.
 - **Email:** You can find their email address on their official website or through online directories.
 - Website form: Many legislators have a contact form on their official website.
- 3. **Draft your message:** Whether calling, emailing, or using another method, make sure your message is clear and concise. Introduce yourself, explain the purpose of your meeting (advocacy on a particular issue), and suggest some dates and times that would work for you. These requests are usually submitted three to four weeks prior to your intended event date.



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- 4. **Follow up if necessary**: If you don't hear back within a reasonable amount of time, don't be afraid to follow up. Politely remind them of your initial request and ask if they've had a chance to consider it. This should occur one to two weeks prior to the intended event date.
- 5. **Confirm the meeting:** Once a meeting time has been agreed upon, make sure to confirm the details, including the day-of contact for each legislator and their staff. This ensures that everyone is on the same page and reduces the likelihood of any misunderstandings.

Contacting Other Chapters

ONS encourages your chapter to collaborate with other groups in your state or region. If you would like to contact the surrounding chapters to invite them to work with you on an advocacy event, please contact chapters@ons.org for a list of contacts.

Requesting ONS Speaker Support

If you are interested in advocacy representatives speaking at your event (in person or virtually), please fill out our <u>Advocacy Speaker Request</u> form. Advocacy support staff can help with issue briefings and provide tips on taking meetings with representatives. ONS and Hart Health staff will make every effort to accommodate your request, schedule permitting. Please submit this application at least 60 days before your intended event.

Week of Event Checklist

Confirm logistics with venue.
Prepare issue briefs for each attendee and leave behind information sheets for each office meeting.
Confirm volunteers and share logistical information with attendees.
Confirm speaker arrival time and assign a volunteer to serve as a greeter.
Print registration list and other important documents.
Provide maps of the facilities for appointments and receptions.
Set up physical space:
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- Make sure the venue has a registration table outside the room (if applicable).
- Clearly mark your event with identifying and directional signs.
- Place signage outside of the room, and in the lobby area of the venue.



Meeting Tips

You Represent ONS

As you meet with legislators and their staff, you are representing ONS and our key legislative positions that make a difference for oncology nurses. Focus on the ONS legislative issues and share relevant information about your experiences as a nurse treating patients with cancer. Remember that nurses are the most trusted healthcare professionals, and your voice as an oncology nurse deserves to be heard.

Dress Professionally

Because you are representing a professional organization and meeting with influential decision-makers, it is important that you dress in business attire, such as a suit, dress, or pants with a nice sweater or shirt, as well as comfortable walking shoes. Please avoid wearing jeans, shorts, sneakers, and other more casual clothing. Although most state legislatures do not have an official dress code for office visits, we must dress respectfully to give a good impression of ONS and the oncology nursing profession.

Arrive Early

Please arrive early rather than be late for a scheduled visit. As you enter, please be quiet and respectful of front office staff who may be busy working. Introduce yourself to the receptionist and let them know who your visit is scheduled with. They may ask you to sit in their front lobby or wait in the hallway if your group is large or the office is crowded.

Be Polite

Don't be surprised if the staffer you meet is very young and you are not able to meet the actual lawmaker. Staffers are very knowledgeable on issues and processes and convey your visit details and requests to their bosses. Treat them as politely and respectfully as you would the elected official. At the end of the visit, thank the legislator or their staff for their time.

Introduce Yourself

Start your meeting by telling them where you live and work. Making local connections is valuable. If you have business cards, bring them to leave with the staffers you meet.

Make Your Ask

As soon as you've introduced yourself, make your ask. Lawmakers and their staff expect the ask. Present the issue and what you would like them to do. If they ask a question that you do not know the answer to, do not guess at an answer. Take their card and get back to them with an answer.



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Stay on ONS's Message

Give the ONS folder to the staffer at the beginning of your meeting so they can review it and take notes. As you discuss the key issues, be careful not to let the member or staffer lead you away from your topics. You have limited time to make your key points on the ONS priority issues and answer questions, so remain focused. If they ask about other issues, graciously tell them that you will bring those to the attention of ONS and turn the conversation back to the key topics.

Avoid Personal Politics and Causes

Please do not use ONS advocacy events as an opportunity to promote your personal politics and causes. Outside of chapter advocacy, we encourage you as a constituent to contact your representative and senators and share your personal views on any issue you'd like, but this should happen outside ONS events. Also avoid mentioning any political donations that have been made to the candidate; this is strictly prohibited in this type of setting.

Tell Your Story

Oncology nurses have an important and unique perspective on healthcare issues. Your experiences are important and influential. Be prepared with specific stories to share in your meetings. Stories can be incredibly meaningful.

Follow Up

After your meeting, follow up via email with the staff. They will provide you with their business card. In this toolkit, you can find a draft thank-you message to personalize and email to them after your visit.

Post-Event Checklist

Hold a debrief with your attendees to hear about how their meetings went. You may want to invite advocacy support staff to attend and listen, as they can be helpful with directing next steps.
Send thank-you notes.
Follow-up with any information or other action items promised at the meeting.
Keep track of the bills and issues and monitor your legislator's actions. If they follow through on a promised action, be sure to thank them. If not, encourage them to do so.
Continue to build relationships by inviting legislators and their staff to attend or speak at chapter events and keeping them informed about chapter affairs.



Chapter Advocacy Roadmap

ONS partners with HartHealth to provide support to chapters in their advocacy journey. Below, you will find a roadmap for chapters that outlines suggested activities, educational topics, and event types, depending on your chapter's advocacy level. In addition, your chapter can request advocacy event assistance. Offerings vary based on your chapter's previous advocacy experience.

Review the levels below to determine where your chapter would fall on the advocacy spectrum; if you have any questions, please reach out to healthpolicy@ons.org.

Level 1. Exploring Advocacy

Definition	Chapter currently has no established methods of routine advocacy communication but is interested in initiating opportunities for education and engagement.	
Suggested Chapter Activities	 Provide routine advocacy updates via email or at meetings. Identify an advocacy chair for chapter. Routinely attend quarterly advocacy calls. Promote Advocacy 101; sign up for Advocacy News and Action Alerts for members. 	
Suggested Education Topics	 Understanding advocacy and nursing, becoming an advocate Understanding the health policy agenda 	
Suggested Event Types	Virtual meeting presentation(s)	
Event Support Provided by ONS	Provision of speakers for virtual presentations up to twice annually	
Costs	No costs to the chapter for support outlined above	



Level 2. Gaining Confidence

Definition	Chapter is establishing methods to routinely communicates on health policy issues and is interested in beginning to educate members. Chapter has engagement from some members on advocacy topics. Provide routine advocacy updates via email or at meetings. Identify an advocacy chair for the chapter. Routinely attend quarterly advocacy calls Promote of Advocacy 101; sign up for Advocacy News and Action Alerts for members. Hold discussions dedicated to issues of interest. Share federal action alerts with membership and establish engagement goals.	
Suggested Chapter Activities		
Suggested Education Topics	 Federal Issue briefings Holding a meeting with a legislator How a bill becomes a law, the legislative process 	
Suggested Event Types	 Virtual meeting presentation(s) and/or one annual in-person program (four hours or less) Advocacy chair participation in a local or national advocacy event (ONS Capitol Hill Days, coalition advocacy event, state lobby day) 	
Event Support Provided by ONS	 Provision of speakers for virtual presentations up to twice annually Virtual assistance for in-person program planning Presenter available for programs two hours or more in length upon request Assistance with preparing to participate in lobby events as needed 	
Costs	 Travel and accommodations expenses for in-person speakers For events that require more than two days of travel and accommodations, there is an on-site staff support fee (A). 	



Level 3. Engaging

Definition	Chapter routinely communicates on health policy issues and is beginning to offer more education and programming. Chapter has engagement from a larger percentage of members on advocacy topics.	
Suggested Chapter Activities	 Provide routine advocacy updates via email or at meetings. Identify an advocacy chair for the chapter. Routinely attend quarterly advocacy calls. Promote of Advocacy 101; sign up for Advocacy News and Action Alerts for members Hold discussions dedicated to issues of interest. Share federal action alerts with membership and establish engagement goals. Identify one or two relevant state topics for action alerts and establish engagement goals. 	
Suggested Education Topics	 Federal and state issue briefings Role of a lobbyist in a professional organization 	
Suggested Event Types	 Virtual meeting presentation(s) and/or one annual in-person program (full or half day) Advocacy chair participation in a local or national advocacy event (e.g., ONS Capitol Hill Days, coalition advocacy event, state lobby day) Promoting member participation in a local or national advocacy event (e.g., ONS Capitol Hill Days, coalition advocacy event, state lobby day) 	
Event Support Provided by ONS	 Provision of speakers for virtual presentations up to twice annually Virtual assistance for in-person program planning Presenter available for programs two hours or more in length upon request Assistance with preparing to participate in lobby events as needed 	
Costs	 Travel and accommodations expenses for in-person speakers For events that require more than two days of travel and accommodations, there is an on-site staff <u>support fee (A)</u>. 	



Level 4. Gaining Proficiency

Definition	Chapter routinely communicates on health policy issues and has successfully held education programs. Chapter is beginning to offer state-based lobbying days but requires some support to do so.		
Suggested Chapter Activities	 Provide routine advocacy updates via email or at meetings. Identify an advocacy chair for the chapter. Routinely attend quarterly advocacy calls. Promote of Advocacy 101; sign up for Advocacy News and Action Alerts for members Hold discussions dedicated to issues of interest. Share federal action alerts with membership and establish engagement goals. Identify one or two relevant state topics for action alerts and establish engagement goals. Identify two to four relevant state topics for action alerts and increasingly engage with them. 		
Suggested Education Topics	Involvement in state-level coalitions		
Suggested Event Types	 Hosts biannual, in-person or annual, virtual state lobby day including meetings with legislators Advocacy chair participation in a local or national advocacy event (e.g., ONS Capitol Hill Days, coalition advocacy event, state lobby day) Promoting member participation in a local or national advocacy event (e.g., ONS Capitol Hill Days, coalition advocacy event, state lobby day) 		
Event Support Provided by ONS	 Provision of speakers for virtual presentations up to twice annually Virtual assistance for in-person program planning Presenter available for programs two hours or more in length upon request Assistance with preparing to participate in lobby events as needed Pre-event assistance developing event agenda, identifying issues, and preparing issue briefs and handouts Support for planning team in how to schedule legislator meetings 		
Costs	 Travel and accommodations expenses for in-person speakers For events that require more than two days of travel and accommodations there is an on-site staff <u>support fee (B)</u>. 		



Level 5. Adept

Definition	Chapter routinely communicates on health policy issues and has successfully held education programs and state-based lobbying days on more than two occasions. Chapter understands the process for hosting these events and requires minimal support to do so.		
Suggested Chapter Activities	 Provide routine advocacy updates via email or at meetings. Identify an advocacy chair for the chapter. Routinely attend quarterly advocacy calls. Promote of Advocacy 101; sign up for Advocacy News and Action Alerts for members. Hold discussions dedicated to issues of interest. Share federal action alerts with membership and establishes engagement goals. Identify one or two relevant state topics for action alerts and establish engagement goals. Identify two to four relevant state topics for action alerts and increasingly engage with them. Work with state-based coalitions on shared advocacy goals and sign-on letters. Initiate support letters for state issues aligned to the health policy agenda. 		
Suggested Education Topics	 Federal and state issue briefings Ethical considerations and dilemmas in health policy Appropriations and budgeting process 		
Suggested Event Types	 Hosts annual state lobby day including meetings with legislators Advocacy chair participation in a local or national advocacy event (ex. ONS hill day, coalition advocacy event, state lobby day) Invites legislators to meet with the chapter on relevant topics Promote member participation in a local or national advocacy event (e.g., ONS Capitol Hill Days, coalition advocacy event, state lobby day) 		
Event Support Provided by ONS	 Pre-event virtual support for event planning, issue identification, and preparation of issue briefs Virtual issue briefings upon request Assistance with identifying legislators to invite to chapter as appropriate 		
Costs	 No costs to the chapter for national support as outlined above For on-site staff support for events, a <u>convenience fee (C)</u> is charged as well as the cost of travel and accommodations. 		



Support and Convenience Fees

	Support Fee (A)	Support Fee (B)	Convenience Fee (C)
	On-site support for education programs 4 hours or less with no legislator meetings that require more than 2 days of travel and accommodations	On-site support for multiday education programs with legislator meetings that require more than 2 days of travel and accommodations	On-site support for multiday education programs with legislator meetings for chapters with significant experience hosting these events
Small Chapters	No charge	No charge	\$250
Medium Chapters	No charge	No charge	\$375
Large Chapters	No charge	\$200	\$450
Extra Large Chapters	\$150	\$400	\$1,250
Mega Chapters	\$250	\$750	\$2,000



Meeting Request Email Template

Subject: Request for Meeting to Discuss [Advocacy Topic and Bill Number]

Dear [Legislator's Name],

I hope this email finds you well. My name is [Your Name], and I am a constituent from [Your City/Town] in your district, and a member of the [Chapter Name] chapter of the Oncology Nursing Society. I am writing to request a meeting with you to discuss an important matter that affects our community: [Briefly describe the advocacy topic or issue you want to discuss].

As oncology nurses, we are passionate about [briefly explain why this issue matters to you and to oncology nursing]. We also believe it is crucial to engage in constructive dialogue with our elected representatives to explore potential solutions and advocate for positive change.

We would appreciate the opportunity to meet with you to share more information about this issue and to discuss how we can work together to address it. The [Chapter Name] chapter is hosting an advocacy day on [Event Date], and we would be honored if you could find time for a brief meeting during the event. Please let us know what works best for your schedule, and we will do our best to accommodate.

Also, please let us know if you would like us to provide any materials or background information on the topic.

Thank you for considering our request. We look forward to hearing from you to discuss this important matter further. Your time and attention to this issue are appreciated.

Warm regards,

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



Email Template for Chapter Members

Subject: Help [Chapter Name] Advocate for [Agenda Priority]

Dear chapter members,

We're reaching out to recruit participants for our upcoming **Advocacy Day** on [Date]. This is a fantastic opportunity to make a direct impact on the issues that matter most to oncology nurses. Whether you're a seasoned advocate or new to the cause, your voice is invaluable.

During the event, we'll be gathering to meet with lawmakers, share our stories, and champion the policies that will improve our patients' lives. It's a chance to connect with fellow nurses and make sure our priorities are heard loud and clear.

Here's why your participation is so important:

- Make a direct impact: Speak with legislators who can influence change.
- Amplify our collective voice: The more nurses we have involved, the stronger our message.
- Advocate for change: Whether it's a local, state, or national issue, your input can shape policy decisions that affect cancer patients and nurses alike.

Details:

- Date/time: [Date/Time]
- Location: [Location or virtual link]
- Agenda: [Brief overview of the day's schedule]
- Registration: [Registration link]
- Registration fee: [Registration fee, if applicable]

We'll provide all the training and materials you need, so **no prior advocacy experience is necessary.** Plus, you'll be part of a supportive and passionate group of nurses working together toward a common goal.

If you're interested in participating or have any questions, please don't hesitate to reach out to [Contact Name] at [Contact Email/Phone].

Together, we can make a real difference! We hope you'll be part of this impactful day.



Sample Agenda

Below is an example of an agenda, inspired by an event previously hosted by an ONS chapter.

7:00 AM Breakfast and registration 8:00 AM Welcome remarks 8:15 AM Keynote speaker 8:45 AM Guest speaker 1 9:00 AM Guest speaker 2 9:15 AM Introduction of bills 9:45 AM Education (covering information on each bill) 10:15 AM Group selection (break into legislative groups) 10:45 AM Practice (role-play example meetings with legislators) 11:15 AM Conversation outlining (decide who will cover certain bills in each group, what will each person say, who will start and end, etc.) 11:45 AM Questions 12:00 PM Lunch 1:00 PM Meetings with legislators 4:00 PM Evaluation and wrap-up



Sample Topic Sheet for Participants

Many of your members may not be well-versed in advocacy, and that's fine. The key is to provide brief talking points, make a clear ask, and ensure everyone is on the same page. Below is a sample sheet from a prior chapter advocacy event. These sheets include a brief overview on the bill in question, a cheat sheet for members on the bill's status, and a clear ask that the chapter members should be making. Advocacy support staff are happy to help craft these topic sheets (at least three weeks' notice is required).

House Bill 24: Biomarker Testing

Overview

- Biomarker testing is the standard of care for many patients with cancer, but insurance coverage for biomarker testing is failing to keep pace with advancements in treatment.
- Nearly 60% of all cancer drugs approved in the last five years require or recommend biomarker testing before use.
- Approximately 55% of cancer clinical trials involve biomarkers.
- Biomarker testing is used in patients who already have been diagnosed with cancer.
- It's not a screening or genetic test.
 - Screening looks for signs of cancer.
 - Genetic tests look for specific genes linked to inherited risk to developing certain cancers or passing the gene on to children.
- Timely access to appropriate biomarker testing can benefit patients.
 - Achieve better health outcomes.
 - Improve quality of life.
 - Reduce costs.

Status

- Primary sponsor: Representative Andrea White
- In House Insurance Committee: Fifth hearing, May 2024

Our ask: Support HB 24 to expand appropriate coverage of biomarker testing for public and private insurance plans.



Thank-You Message Template

Subject: Thank You for Meeting With Us

Dear [Legislator's Name],

Thank you so much for taking time to meet with me and other nurses from the local chapter of the Oncology Nursing Society (ONS) to talk about several bills to greatly improve access to quality care for patients with cancer. As we discussed, ONS strongly supports and urges passage of the following pieces of legislation:

• List legislation discussed here.

Thank you for your support and consideration. If you have any questions, please contact the ONS at healthpolicy@ons.org.

Sincerely,

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

Thank you to the planning team of Ohio Oncology Nurses at the Statehouse for sharing their resources during the development of this toolkit.



Metric Completion Checklist

To consider this metric completed, your chapter must have hosted or participated in one advocacy event, based on your chapter's advocacy level. To confirm completion of this metric please complete the following checklist.

Use the Chapter Advocacy Roadmap to determine your advocacy level and qualifying events
Host or participate in a qualifying advocacy event prior to December 31.
Report event information and attendance to confirm completion of this metric on your next Quarterly Report.

