



Depression and Bipolar
Support Alliance

Peer Advocacy Training Toolkit

Welcome

The Depression and Bipolar Support Alliance (DBSA) has for nearly 30 years fostered peer-led support groups across the nation that collaborate to provide information, empowerment, support, and inspiration to people who live with mood disorders and their loved ones. Central to these communities have been two guiding principles: that there is no tool more powerful for the attainment of wellness than the support and guidance of a peer, and that it is a person's right and responsibility to advocate authoritatively for her or his own choices and needs.

With our new advocacy training initiatives, we will build on DBSA's storied history of personal advocacy to coalesce our grassroots force of peers into knowledgeable and focused activists for messages, structures, and practices that advance mental health, individual choice, and wellness. Our efforts to educate and influence our legislators, regulators, and other policymakers will have the urgency and power of our personal stories, from which we can show both what works well in mental health policy and advocate for what needs to work better.

Indeed, DBSA—as an organization of peers—is uniquely suited to ensure the presence of people with depression and bipolar disorder in conversations and decisions that directly affect us. Just as we have supported one another towards individual wellness, now we will advocate powerfully as a unified and focused community.

We salute you for taking on the role of advocate and joining us for this training. Together with each of you, the DBSA family of Board, staff, and chapters will be a powerful voice driving the conversation on mood disorders.

With profound thanks,

Allen Doederlein,



President
DBSA

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About DBSA

The Depression and Bipolar Support Alliance (DBSA) is the leading peer-directed national organization focusing on the two most prevalent mental health conditions, depression and bipolar disorder, which affect more than 21 million Americans, account for 90% of the nation’s suicides every year, and cost \$23 billion in lost workdays and other workplace losses.

DBSA’s peer-based, wellness-oriented, and empowering services and resources are available when people need them, where they need them, and how they need to receive them—online 24/7, in local support groups, in audio and video casts, or in printed materials distributed by DBSA, our chapters, and mental health care facilities across America.

Through more than 700 support groups and nearly 300 chapters, DBSA reaches millions of people each year with in-person and online peer support; current, readily understandable information about depression and bipolar disorder; and empowering tools focused on an integrated approach to wellness.

Visit DBSA on the web at DBSAlliance.org—and don’t forget to check out the DBSA Advocacy Center **DBSAlliance.org/AdvocacyCenter**, where you’ll find more valuable information and resources.

Introduction

Why is advocacy important?

We do not have a democracy of the majority. We have a democracy of the majority who participate.

–Thomas Jefferson

As Thomas Jefferson’s words remind us, individual citizens can have tremendous influence in the legislative process. Members of Congress and their staff report that personalized communications from constituents are the single most important factor in their decision-making process—yet, only a small fraction of Americans reach out to communicate with their elected officials each year.

While the media tend to cover the most controversial and major issues of the day—issues that can often feel impervious to one individual’s input—the bulk of Congress’ work each week revolves around hundreds of issues that affect much smaller segments of the American population. Questions such as “Should Congress revise the way it pays for community mental health services?” or “Should states come up with a process to certify peers as Medicaid providers?” may not draw national media attention, but they can have a profound impact on the lives of millions of Americans.

The purpose of this advocacy toolkit is to help you focus your power as a grassroots activist and use it in the most effective way possible to get your message heard on Capitol Hill.

The most effective lobbyist I will ever face is a registered voter from my district who comes to me with a well-documented explanation of how the legislation will affect him.

–Charles Hebner, former Speaker,
Delaware House of Delegates

Congressional Communications

An Overview

More than 200 million communications reach the US Congress every year—phone calls, faxes, emails, and visits. A senator from a large state like California, New York, or Texas represents as many as 37 million people and an economy bigger and more complex than some of the world’s countries. Even legislators from the smallest states and districts represent hundreds of thousands of Americans.

What influences legislators when they make decisions? Sometimes, legislators vote based on ideology or party unity. However, they do not have predetermined views on every single issue that comes before Congress, and constituents play an important role in educating them about the right policy choices to make!

Here are a few of the factors that might encourage a member of Congress to vote in a particular way:

- Compelling personal stories told by constituents. These provide an emotional hook and an engaging way for legislators to talk about the issue with their colleagues and the press.
- Data about the economic impact a policy would have on their district or state, especially when presented in terms of job losses or potential economic growth.
- Data, information, or stories about how that policy could make life better for the people in their district.
- Hearing from dozens, hundreds, or thousands of their constituents urging them to take a stance.
- Hearing from just a few key constituents, like friends, interest group leaders, or others who have built a strong relationship with them. (Hint: This can include you. See page 6 for tips on building strong relationships with legislators!)

Remember, a good public policy recommendation isn’t always sufficient to win a legislator’s support. Legislators need to know that it’s important to voters, to the well-being of their constituents, and to the economic health of their district.

When I feel the heat, I see the light.

–Everett Dirksen, former Senate majority leader

Making Your Message Stand Out

To make your message stand out from the millions that arrive in Congress each year, do your homework.

Know your audience. Before communicating with or visiting your elected officials and their staff, you should know as much as possible about who you are visiting. Checking the legislator's congressional and campaign websites will provide a broad array of important information about the official, their committee/subcommittee assignments, and issue interests. Many officials send out emails to their constituents who wish to stay informed of their activities. Knowing whether an official is a long-time supporter of mental health issues, a strong fiscal and social conservative, or interested in senior citizen and veterans issues, for example, will help you determine how best to present the issues you will discuss.

Know your issues. Know the arguments for, and against, the issues you want to discuss. Read appropriate background information on any issue you will be talking about and be able to answer questions or know how to get the answers to any questions that are raised.

Prepare. This toolkit contains guidelines for conducting a meeting with an elected official or their staff, communicating effectively on an issue, and other topics. Keep this Peer Advocacy Training Toolkit for future reference and as a resource to sharpen your skills as your relationship and level of involvement grows.

Most importantly, don't underestimate the impact that you can have if you approach communication and developing meaningful relationships with your elected officials and their staff in a thoughtful and ongoing manner!

The Importance of Congressional Staff

Each US senator has perhaps 2–3 dozen staff members, while each representative has 12–15. Additionally, both House and Senate committees have professional staff that assist members of Congress in the deliberations of those committees.

The staff of a senator or representative are of tremendous importance in the legislative process. They advise members and do much of the hands-on work. Staff will often have issue-area expertise that elected officials lack, and legislators rely on staff for advice and guidance when it comes to taking positions on particular issues.

KEY STAFF

Chief of Staff

This person is the most senior staff member and advisor to the member of Congress.

Legislative Director (LD)

This person oversees the legislative staff and works with the chief of staff and the member of Congress to make policy decisions.

Legislative Assistant (LA)

Each LA is usually responsible for several policy issues. LAs monitor and analyze specific legislation and recommend action to the member of Congress. They also frequently meet with constituents regarding issues in their assigned area.

Scheduler

This person is responsible for scheduling meetings with the senator or representative.

State or District Director

This person can help coordinate site visits and in-person meetings when your Member of Congress is home in the district.

Press Secretary

This person is the key contact if you're working on media activity involving your member of Congress.

When reaching out to staff about policy issues, always begin with the LA for that issue. For mental health, this will usually be the health LA. Sometimes, it can also be useful to be in contact with the senator's or representative's committee or subcommittee staff.

When you set up meetings, don't be concerned if you meet with staff instead of the legislators themselves. Staff manage the day-to-day work of the office and are influential with their bosses. To have maximum impact with your senator or representative, you will need to cultivate strong relationships with his or her staff.

Building Meaningful Relationships

The best time to get to know your legislators is back home, when they are less distracted by the business of Congress. You should make every effort to visit your senator or representative to get to know them better and educate them about mental health issues when they are home during a congressional recess. If your elected representatives know you as a voter, constituent, friend, and supporter, they are likely to be more responsive to you than to those who have not developed that relationship and who write or call only when they are in need.

Increasing your degree of influence with your legislators is easier than you think! Here are ten ways to get to know your members of Congress and their staff better:

1. Invite them to your office or facility, if you have one, for a site visit. A site visit allows them to get a first-hand understanding of the work you do and how it matters to the people you serve. It is also an opportunity for them to speak directly with your staff or clients and hear their compelling stories. You may also wish to invite them to an upcoming educational session or other event your organization is hosting.
2. Attend in-district events, such as town hall meetings. These types of meetings are a great way to bring your issues to their attention and speak with them personally.
3. Establish yourself as a helpful expert that their staff can turn to when they have questions about an issue. Provide useful, balanced information that helps inform staff about the issue and establishes you as a person they can turn to when they need to know more.
4. Stay in touch. Don't wait until you need something from your legislators to communicate with them. Was your organization featured in a recent news story? Forward it to the health LA. Did a new report highlight how a particular policy might affect your community? Let staff know. Being in periodic contact throughout the year—especially when you're not asking for anything—helps build relationships.
5. As a private citizen, contribute to and/or volunteer for campaigns of your choosing. This shows legislators that you support the work they're doing in Washington and gives you additional opportunities for interaction and relationship building. (Keep in mind that nonprofits are bound by different rules than individuals when it comes to making campaign contributions. Be careful to only contribute from your own finances in your role as a private citizen, not as an official representative of your chapter.)
6. Help generate positive media attention when legislators visit your organization by working with them and their staff to develop and submit a press release with photos.
7. Help legislators when their constituents have a behavioral health related issue by being available to answer any questions they or their staff might have.
8. If you wish to personally host a fundraiser, work with the legislator's campaign staff—not their Senate or House staff—to confirm a date and location, invitation list, and other details. Remember that if you are hosting a fundraiser, it must be in your role as a private citizen, not as a representative of your chapter.
9. Write a letter to the editor of your local newspaper mentioning your legislator when he or she supports or otherwise advances your issues in the Congress.
10. Say thank you. Members of Congress and their staff are constantly bombarded by requests and demands, often couched in less-than-polite terms. In fact, fewer than 5% of written communications to Congress are to thank members for their work. Showing appreciation for their position or vote on a particular issue will make your message stand out.

Meeting with Your Members of Congress

There is no substitute for the opportunity to communicate face-to-face with your legislators. They get to hear your story, unfiltered and direct from you, and gain a sense of your dedication to issues important to you and others within your community. When you're ready to set up a meeting with your member of Congress, keep the following suggestions in mind.

PLANNING FOR YOUR MEETING:

- Meet only with your own elected officials or those whose constituents you serve.
- Bring another spokesperson with you if possible and let the legislator's office know who will be coming with you and why.
- Call in as far in advance as possible to schedule the meeting.
- Don't hesitate to meet with staff if the elected official is unavailable.
- Show up ten minutes early. Never be late yourself, but be understanding if the legislator or staff are late.
- Do your homework: find out what committees the member serves on and whether they've supported your issues in the past.

TIPS FOR YOUR PRESENTATION:

- Always address your legislator as "senator," "congressman," or "congresswoman," even if you already know them.
- Focus on one issue per meeting and assume you will have ten minutes to make your case.
- Don't forget to ask for something concrete! For example, "please sign on as a co-sponsor to HR 1" is better than "please support prevention policies."
- Tell them a little about yourself and your organization.
- Leave them brief information on your organization and the issues you are discussing. One-pagers with bullet points are best—staff don't have time to peruse long handouts.
- Suggest a visit to an upcoming educational session so they can see firsthand what you are all about.
- Thank them for their time and ask what you can do for them.

AFTER YOUR MEETING:

- Always send a brief thank you letter within a day or two of your meeting.
- NEVER give campaign contributions in their office—it's illegal. (Donating to a legislative campaign as a private citizen is perfectly acceptable at a fundraiser, online, or by mailing to their campaign office.)

Manage Questions and Reactions

During your visits, members will have a variety of reactions to what you are saying. Here are some guidelines as to how you should follow up on you legislators' responses to ensure you get the most out of your Hill visit.

If your elected official says . . .

“This sounds great! I’ll sign on to everything!”

Thank them and let them know that you’ll be in touch to follow up. If possible, find out who their mental health/addictions, and/or health legislative assistant (LA) is for both their DC and local offices. Sometimes members agree to take specific actions but will forget if not prompted, so it’s important to have these LAs’ contact information. Also, make sure to let DBSA know about any commitments you may have received.

“I’m interested. Are there letters being circulated about this bill? What can I do?”

Thank them and refer to the immediate actions/requests that are listed on the fact sheets. Let them know that you will keep them posted on any future actions, such as signing on to a circulating letter. If possible, find out the name of the local staff person as well as the DC staff person to follow up. Make sure you let DBSA know about any commitments you may have received.

“Sounds interesting. I’d like to learn more.”

Members of Congress, especially those recently elected, are often unwilling to make commitments the first couple times they are asked. This is in part because they simply cannot agree to everything that is asked of them and/or are eager to learn more about an issue before making a decision. If you get this reaction, thank them and let them know you’re happy to serve as a resource. Find out the name of the appropriate staff people and follow up with them. Let DBSA know of their interest.

“I’ve always opposed federal funding for mental health and addictions issues.”

Be polite, but persistent. Let them know that while you disagree with them, you hope that the member or staff might be willing to take some time to learn more about the valuable services your group provides to the community—services that are an entirely appropriate and worthwhile investment of federal funds. If possible, find out the name of the local staff person as well as the DC staff person to follow up.

Ongoing Communication with Your Members of Congress

TIPS FOR WRITING OR EMAILING YOUR MEMBER OF CONGRESS

After the attacks of September 11, 2001, and subsequent anthrax attacks on the US Senate, all mail entering the Capitol complex is screened by the US Postal Service. This can result in delays of many days—sometimes weeks—for your correspondence to arrive. For this reason, email is the most efficient way to communicate with your members of Congress.

As a constituent and a citizen, you should write only to your own legislators and those whose constituents are served by your organization. Here are some general guidelines and suggestions for writing to your legislators:

- Tell your legislator specifically what you would like them to do in your opening sentence (e.g., vote for House Bill 1 or contact Chairman Jones and ask him to agree to XYZ).
- Support your request with two or three sentences of relevant facts, avoiding jargon and acronyms that they may not understand.
- Share with your legislator how many people in their district will be affected by the proposal under consideration.
- Remind your legislator of your expertise on the issue (years of experience in the field, with your current employer, and other professional or community involvement).
- Politely request a commitment for their support.
- How do I find the right email address? Most legislators have web-based submission forms for sending messages to their office. These messages are sorted by issue category and routed to the appropriate staff. You can also obtain email addresses for specific staff by calling the member's main Washington, DC office. The Senate and House use similar formats for email addresses.
 - Senate offices use `firstname_lastname@senatorlastname.senate.gov`
(Example: `joe_smith@anderson.senate.gov`)
 - For representatives' offices, the format is `firstname.lastname@mail.house.gov`
(Example: `mary.jones@mail.house.gov`)

TIPS FOR CALLING YOUR MEMBER OF CONGRESS

Telephone calls to legislators and staff are important, especially when a bill is nearing consideration in a subcommittee or committee or on the floor. All DC legislative offices can be reached through the US Capitol switchboard at (202) 224-3121. If you want to get ahold of a legislator or staff when they are visiting their district, use the phone number for their district office(s), which can be found on their websites.

Understand that you will not speak directly with the legislator; instead, leave a message with his or her staff member who answers the phone.

Be polite. Staff work hard to answer the phones all day long, and many constituents are angry and rude. Know that no matter how strongly you feel about an issue, your message has a much better chance of getting through if you keep your cool and thank them for their time.

Be concise. Plan in advance what you want to say. A brief personal description of your tie to the issue, followed by a concrete ask, is best. For example: “I am a person living with depression, and I often struggle to access the treatment I need. Please vote for HR 1, which provides funding to help people like me.”

Where does your message go? Staff keep a tally of the calls they receive on particular issues, so they can report to their boss the number of constituents that have contacted them for or against that issue. When a constituent calls or emails with a particularly compelling personal story, staff may highlight it for the member to see.

MEETINGS IN THE DISTRICT

The weeks when Congress is not in session are an excellent opportunity to attend town hall meetings or invite your senators and representatives to attend community events.

Town hall meetings have traditionally been held at a local gathering place and allow attendees the opportunity to ask questions of their elected officials and voice their opinions on the issues that matter most to them. Usually, the elected official will also give an update on what he or she is working on in Congress. Sometimes, the town hall meeting might be devoted to a particular issue; for example, during the summer of 2009, legislators around the country held town hall meetings on health reform.

More recently, town hall meetings are taking advantage of technology so as to allow participation from more people. For example, telephone town halls follow the same model as a regular town hall meeting, but allow you to participate from home. Some legislators are also turning to Twitter to hold Tweet Chats, where anyone who wants to can participate in the dialogue by using a common hashtag.

Organizing a community event with your legislator can be time consuming, but is valuable in establishing or strengthening your relationships with your elected officials. This is particularly true for groups of like-minded constituents who want to discuss the same issue and highlight work that is taking place in the community around that issue.

Here are some suggestions for setting up a community meeting or event:

- Invite your legislator in person, by letter, telephone, or email either directly or through staff, depending on how well you know the legislator. Be sure to let them know the purpose of the meeting and who will be there!
- Plan your time with your legislator carefully, as they are often on a tight schedule.
- Make sure attendees understand in advance how they will be involved and how they can stay on schedule.
- Find out who will be accompanying your member of Congress to the meeting.
- Have a photographer take pictures for use in the legislator’s newsletter or website and make them available to the local press.
- Ask if you can assist the legislator’s office in writing a press release to send to the local media with photos, if your member of Congress wishes.
- Follow up with a thank you letter to your member of Congress after their visit.

USING SOCIAL MEDIA TO COMMUNICATE WITH YOUR LEGISLATORS

The use of social media for constituent communications with Congress is still in its infancy. Most members of Congress do maintain Twitter feeds and Facebook pages. You should “like” their page on Facebook and follow them on Twitter. Don’t be offended if they don’t follow you back!

74% of congressional staff report that Facebook is an important vehicle for communicating the member’s views and activities to constituents; 51% also see Twitter as important. However, legislators rely less on these social media platforms when it comes to collecting information from their constituents. Email, phone, and in-person visits are still the best way to directly communicate your policy priorities and ask your legislators for their support.

Twitter and Facebook may function more importantly as a means for legislators to keep a pulse on their public image, much like monitoring the local and national newspapers for coverage of their activities. In this way, by tagging legislators appropriately in your posts, you may be able to alert members and their staff to conversations about important policy issues.

Getting Others Involved

As the saying goes, “No man is an island.” Advocacy is no different. The most successful advocates know how to pull together broad coalitions of groups in pursuit of a common goal.

START CLOSE TO HOME

When you’re recruiting advocates, the first and most obvious place to start is within the DBSA membership. Visit DBSAlliance.org/FindSupport to find other DBSA chapters and state organizations in your area. Reach out to them with an email outlining the problem your community faces, your proposed solution, and what they can do to help. You may wish to follow up with a phone call to answer any questions they may have. Remember that potential advocates are more likely to heed your call to action if you ask them to engage in one specific task at a time. There are many ways individual advocates can support their cause:

- Writing to or calling their legislators in support of your cause
- Writing a letter to the editor of their local paper
- Forwarding information about your cause to other people they know
- Attending a local meeting or event organized around this issue
- Signing a petition
- Reaching out to their contacts at other community organizations or nonprofits to help you establish a relationship with those groups
- And many more

LOOK TO THE MENTAL HEALTH CARE COMMUNITY

Other important partners in your efforts are the organizations in your city or state that work on mental health care issues. The National Council for Community Behavioral Health, NAMI, and Mental Health America all have affiliates in most states and many local communities. Visit their websites to find out who these local affiliates are and how to reach out to them. You may also want to reach out to local departments

of health, local social support services, and other nonprofits that serve people with mental illness to see if you can bring them on board with your cause. There are many ways these groups can support you:

- Disseminating information about your cause to their email networks
- Forwarding your call to action via email and social media
- Signing on to group letters of support for a particular issue
- Helping you make connections with key legislators or other potential allies
- Attending your local event about this issue
- Sending a letter on behalf of the organization to their elected officials
- Partnering with you to form a joint coalition to support causes of mutual concern
- And many more

EXPAND YOUR HORIZONS

When you're thinking about what groups to engage in advocacy around a particular issue, get creative! Sometimes, it's the unexpected groups that can provide the biggest bump in your influence. For example, organizations that represent law enforcement officers or emergency room physicians can be helpful when you are advocating for increased funding for mental health services.

TIPS FOR SUCCESS

Here are some rules of thumb in engaging with other groups around advocacy issues:

- Do your homework. Know the mission, values, and goals of the potential partner organization, and be prepared to explain to them how partnering with you on this advocacy effort will help advance their mission and goals.
- Ask for something specific. For example, telling a representative of another organization that you should work together to help people with mental illness is much less likely to yield a response than asking them to send a letter of support for your cause to the governor.
- Be flexible, if possible. Sometimes, a group might have concerns about your cause or might not be able to come on board unless you slightly revise the scope or direction of your advocacy campaign. Give them a chance to fully express their thoughts, and consider what they say. If possible, try to tweak your plan—within reason, of course! While you can never please everyone, it's often helpful if you have the flexibility to make minor adjustments so as to accommodate others. Even if you can't change your course of action, at least you've established a line of dialogue with the other group that will be helpful in future interactions with them.
- Be open to hearing about other ways they'd like to collaborate. Maybe that group doesn't engage in lobbying but they are willing to disseminate your call to action via their email networks. Be open to all the possibilities!
- Keep them up to date on your progress. Once someone becomes invested in your cause, they want to know that their participation is making a difference. Keep individual advocates and partner groups updated on any good news that arises.

Key Congressional Committees

Committees are essential to the legislative process in Congress. Each committee has jurisdiction over a certain set of issues and the members of that committee get the first crack at revising and voting on a bill. Visit the key committees' websites to find out if your members of Congress serve on one of the below committees, because their voice may be a powerful one for promoting mental health and substance use disorder policies.

Senate Appropriations Committee

The largest committee in the US Senate, the Appropriations Committee writes legislation that allocates federal discretionary funds to the different government agencies, departments, and organizations, including the Substance Abuse and Mental Health Services Administration. As just one example, funding for the Primary Care/Behavioral Health Integration program goes through the Appropriations Committee before becoming available.

[Appropriations.Senate.gov](https://www.appropriations.senate.gov)

Senate Finance Committee

This committee handles a number of issues related to health programs that are financed by a specific tax or trust fund, including Medicaid, Medicare, and the Children's Health Insurance Program. Any Senate bill that is related to taxes has to come through this committee.

[Finance.Senate.gov](https://www.finance.senate.gov)

Senate Health, Education, Labor, and Pensions (HELP) Committee

As indicated in the name, this committee has jurisdiction over the country's health care (except for the health care programs under the finance committee's jurisdiction) and oversees public health and health insurance statutes to address changing patterns in the health care industry. The committee reviews all matters related to health care and reports on these issues to Congress.

[HELP.Senate.gov](https://www.help.senate.gov)

House Appropriations Committee

Similar to the Senate Appropriations Committee, this committee is responsible for deciding how the federal government spends money and which programs will be funded.

[Appropriations.House.gov](https://www.appropriations.house.gov)

House Energy and Commerce Committee

This committee maintains legislative oversight in a multitude of areas including public health, environmental health, and telecommunications. Its jurisdiction extends over several agencies, including the US Department of Health and Human Services. It also has jurisdiction over Medicaid and parts of Medicare.

[EnergyCommerce.House.gov](https://www.energycommerce.house.gov)

House Ways and Means Committee

The Ways and Means Committee is responsible for writing taxes and has jurisdiction over Social Security, Medicare, and enforcement of child support laws, to name a few. Similar to the Senate Committee on Finance, any House bill that has anything to do with taxation must come through this committee, so it's pretty influential. It also has jurisdiction over Medicare.

[WaysAndMeans.House.gov](https://www.waysandmeans.house.gov)

House Committee on Education and the Workforce

As you can probably tell from the name, this committee has jurisdiction over all things related to education and labor. This includes access to quality health care for working families, services for at-risk youth, and programs for low-income populations.

[EdWorkforce.House.gov](https://www.edworkforce.house.gov)

Navigating the Congressional Session

The pace of a Congress is frantic and becomes more so as the session nears its conclusion. It's always a good idea to check in with your senators and representatives and their key staff early in the session (which begins every two years, in odd-numbered years) to lay out major issues and policy positions. It's best to do this in person. As the Congress progresses, try to engage in ongoing communication efforts with legislators and other government officials.

THE IMPORTANCE OF THE BUDGET PROCESS

In addition to important bills, many of your legislative priorities will be addressed through the annual appropriations process. Find out which of your legislators serve on the Appropriations Committee and whether they are on the Subcommittee on Labor, Health and Human Services, Education, and Related Agencies. This committee has jurisdiction over the budget for the Substance Abuse and Mental Health Services Administration, which funds many mental health initiatives. The budget process begins each year when the president submits budget requests to Congress. The Senate and House Appropriations Committees then begin deliberating and amending the budget to craft their own budget bills. In the course of the usual budget process, these 12 bills would then be passed by each chamber, with differences worked out in a conference committee. However, sometimes when compromise is difficult to reach, any remaining appropriations bills can be bundled into one omnibus bill for passage en masse. The budget process can be unpredictable, which is why it's important to remain in touch with your Appropriations Committee members throughout the year.

Helpful Websites and Resources

DBSA Advocacy Center (DBSAlliance.org/Advocacy)

National Council for Behavioral Health (TheNationalCouncil.org)

US House of Representatives (House.gov)

US Senate (Senate.gov)

US Department of Health and Human Services (HHS.gov)

Substance Abuse and Mental Health Services Administration (SAMHSA.gov)

Centers for Medicare and Medicaid Services (CMS.gov)

Congressional Management Foundation (CongressFoundation.org)

Sample Letters

Sample Meeting Request Letter: See page 19

Sample Thank You Letter: See page 20

GLOSSARY OF KEY TERMS

ACA. The Patient Protection and Affordable Care Act (a.k.a. *health reform*), signed into law on March 23, 2010.

Act. A bill which has been made law by passing both houses of the legislature in identical form, been signed into law by the president, or passed over the president's veto.

Administrative rule. Any agency directive, standard, regulation, or statement of general applicability that implements, interprets, or prescribes law or policy, or describes the procedure or practice requirements of any agency.

Agenda. The official work plan for a committee meeting.

Amendment. An alteration made or proposed to be made to a measure.

Appropriation. A sum of money designated for a particular purpose through an appropriations act or permanent law.

Asks. The key issues on your legislative agenda that you will be asking your members of Congress to support.

Bill. A measure that creates new law, amends or repeals existing law, appropriates money, prescribes fees, transfers functions from one agency to another, provides penalties, or takes other action.

Call of the House/Call of the Senate. A call of the House or Senate is a means of compelling all members (unless they are excused) of that chamber to present themselves for a vote on a particular matter. If it comes time for a vote and it appears to members that other members are not present in the chamber, a motion from the floor directs the presiding officer to issue a call of the House or Senate. The call empowers the sergeant at arms to lock the chamber, preventing those present from leaving, and requires the sergeant at arms to bring in absent members—under arrest, if necessary—for the vote.

Capitol. The meeting place of the legislature (the US Capitol building in Washington, DC), not to be confused with *capital* (the capital city of a state, country, or other region primarily regarded as the seat of its government).

Caucus. A caucus (*n.*) is a group of people who share something in common (e.g., they are members of the same political party, such as the Senate Republican Caucus or the House Democratic Caucus, or share something else in common, such as the Freshman Caucus or the Women's Caucus). When these people caucus (*v.*), they meet to address their group's policy questions and to select party leaders or candidates for office.

CBO. Congressional Budget Office, a nonpartisan organization that provides budgetary and economic analyses to help Congress make decisions.

Chair. The legislator appointed by the Speaker of the House or the president of the Senate to preside over an individual committee; for example, the chair of the Ways and Means Committee.

Chief Clerk of the House. The chief administrative officer of the House of Representatives. The chief clerk is elected by all the members of the House and is responsible for keeping records of the proceedings of the House, supervising House employees, advising members on parliamentary procedures, and preparing all House publications for printing.

“Christmas tree” bill. Informal term for a bill that attracts many, often unrelated, floor amendments. The amendments act as ornaments hung onto the bill to provide special benefits to various groups or interests.

CMHS. The Center for Mental Health Services (CMHS) is the division within SAMHSA that handles programs and grants related to mental health.

Committee report. A report made to the Speaker of the House or the president of the Senate by a standing, special, or conference committee, which recommends further action on a measure or reports the measure without recommendation.

Committee Services. Provides nonpartisan, ongoing staff research, policy analysis, and committee staff support to the legislature.

Concurrent resolution. A measure addressing sentiments of both chambers or dealing with issues or matters affecting both houses of Congress, such as a concurrent budget resolution or the creation of a temporary joint committee. Concurrent resolutions are not submitted to the president and do not have the force of law.

Constituent. A citizen residing within the district of a legislator or other elected official.

Current service level. A budgetary term that refers to any budget proposal which requests future funding for service provision at the current level. The current service level will reflect changes due to inflation, labor contract changes, caseload changes, and any other changes required to continue to provide the same level of service.

Digest. The brief summary of a bill.

District. A geographical area designated for representation by a senator and/or representative. Legislative districts are drawn to ensure that a nearly equal number of constituents reside in each legislator's district, and are re-drawn every ten years to accurately reflect changes in population.

Drop/Dropped. Refers to the time when a bill is introduced, either in the House or the Senate.

Emergency board. The joint committee of senators and representatives that meets during interim periods to address state fiscal and budgetary matters.

Emergency clause. A statement added to the end of a measure that causes the act to become effective before the accustomed date. An emergency clause either sets a specific date or is effective immediately, which means that the measure will take effect on the date of its signature into law.

Engrossed bill. The official copy of a bill passed by the Senate and certified by the secretary of the Senate.

Enrolled bill. A final copy of a bill which has passed both houses of the legislature and has been specially reprinted in preparation for the appropriate signatures from Senate and House officials. After these confirmatory signatures, the enrolled bill goes to the president.

Floor. The physical space on which representatives sit in the chambers of the House or the Senate. Also used to refer to measures and business conducted in congressional chambers (e.g. "the bill died on the Senate floor"). Action "on the floor" is that which occurs during a formal session. An action "from the floor" is one taken by a legislator during a session. Someone who has been recognized to speak is said to "have the floor."

Floor personnel. Staffers who work in either the Senate or the House chamber. Floor personnel include sergeants at arms, pages, etc.

General election. An election involving most or all constituencies in a state or nation to choose candidates for office and to vote on ballot measures.

Germane. Being at once relevant and appropriate to the subject of the pending bill or other business. Refers to whether or not a concept or idea is relevant to a bill.

Hearing. A meeting of a committee or subcommittee—generally open to the public—to gather information and take testimony on proposed legislation, to conduct an investigation, or to review the operation of a federal agency or program.

House of Representatives. The legislative body of 435 representatives who are elected every two years. Each US state is represented in the House in proportion to its population. The House is the first legislative body to pass federal legislation; it then passes legislation on to the Senate and the president. The House can also initiate revenue bills, impeach officials, and elect the president if there is no majority in the Electoral College.

Indefinitely postponed. A motion from the floor to postpone further consideration of a bill, without identifying a time for further consideration. In the majority of cases, bills that are indefinitely postponed are not heard again.

Interim. The period of time between two sessions of Congress.

Interim committee. A legislative committee authorized by Congress to study a particular subject between sessions. Interim committees are appointed by leadership after the end of session.

Initiative. A procedure enabling a specified number of voters by petition to propose a law and secure its submission to the legislature.

Joint committee. A legislative committee composed of members of both houses of Congress. (Note: Committees may also *meet jointly*, or simultaneously. For example, two committees may meet simultaneously to hear testimony on matters of interest to both. Such a meeting does not constitute a joint committee.)

Joint resolution. A measure which requires the approval of both chambers and, with one exception, is submitted to the president for possible signature into law. The one exception is that joint resolutions which propose constitutional amendments require a two-thirds affirmative vote in each house but are not submitted to the president; they become effective when ratified by three-quarters of the states.

Journal. The edited record of all the proceedings on the floors of both houses, published after each legislative session.

LAs. Legislative assistants work for members of Congress on particular policy issues. You'll likely be meeting with a legislator's health LA when you visit your representative's office.

Leadership. The presiding officers of each house—the president of the Senate and the Speaker of the House. Also refers to the majority and minority leaders, who are elected by their respective caucuses.

Lobbyist. A person who is employed by an organization to represent its interests before the legislature.

Majority leader. A legislator elected by their caucus to lead the party that holds the majority in their individual house of Congress. The majority leader is responsible for the development and implementation of the caucus agenda.

Markup. The process by which congressional committees debate, amend, and rewrite proposed legislation.

Measure. A written document used by the Congress to propose a law or to express itself as a body. A measure may be a bill, resolution, or other matters on which the Congress takes action.

Minority leader. A legislator elected by their caucus to lead the party that's in the minority in their individual house of Congress. The minority leader is responsible for the development and implementation of the caucus agenda.

Minutes. A written record of the proceedings of a committee.

Motion. The formal way of directing debate on the floor. It is the way, for example, that a member introduces a measure for debate on the floor.

Pocket veto. The president is granted 10 days to review a measure passed by Congress. If the president doesn't sign the bill after 10 days, it becomes law without a signature. If, however, the Congress adjourns during the 10-day period, the bill does not become law and the president has exercised a pocket veto. (See also: *veto*)

Parliamentary inquiry. An inquiry of the committee chair or the presiding officer on the floor concerning parliamentary procedure.

Passage. Favorable action on a measure before either house.

Point of order. A motion from the floor or from a committee member calling attention to a breach of order or a breach of the rules.

President of the Senate. The presiding officer of the Senate. In the US Senate, the vice president of the United States serves as president of the Senate. The president of the Senate may vote in the case of a tie in the Senate, but is not required to.

President pro tempore. A constitutionally recognized officer of the Senate who presides over the chamber in the absence of the president of the Senate (the vice president of the US). The president pro tempore (or "president for a time") is elected by the Senate.

Primary election. A preliminary election in which only the registered voters of a political party nominate candidates for office. A political party may allow registered independents to vote in a primary election.

Quorum. The number of members required to be present before business can be transacted in the House, the Senate, or a committee.

Reconsideration. Taking a second vote on a measure after a motion to do so.

Referral. To direct a bill to a committee after its introduction, generally given to the committee with jurisdiction over the predominant subject matter in the bill or resolution.

Referendum. The submission of a law, proposed by the legislature or already in effect, to a direct vote of the people.

Resolution. A measure used by the House or the Senate to take an action that would affect only its own members, such as appointing a committee of its members or expressing an opinion or sentiment on a matter of public interest.

Roll call. A recitation of each legislator's name, done at the beginning of a floor session or during a call of the House or Senate, for the purposes of identifying those present.

Rules. The guidelines by which the Senate, the House, or a committee governs its meetings.

SAMHSA. The Substance Abuse and Mental Health Services Administration (SAMHSA), a branch of the Department of Health and Human Services that is charged with improving the quality and availability of prevention, treatment, and rehabilitative services in order to reduce illness, death, disability, and cost to society resulting from substance abuse and mental illness.

Score. The overall cost of a bill, determined by the CBO by calculating the amount it will either increase or decrease federal spending and tax revenues. It is easier to garner support for bills that have a low score because they don't add to federal spending.

Secretary of the Senate. The chief administrative officer of the Senate. The Secretary of the Senate is responsible for keeping records of the proceedings of the Senate, supervising Senate employees, advising members on parliamentary procedures, and preparing Senate publications for printing.

Senate. The legislative body of 100 senators that are elected for six-year terms. Each US state is represented in the Senate by two senators, regardless of population. The Senate is the second legislative body to pass federal legislation, following the House. The Senate can also consent to treaties and confirm appointments of federal judges, cabinet secretaries, and other federal officials. The Senate is also responsible for trial of federal officials impeached by the House.

Sergeant at arms. The law enforcement official of the House or Senate, charged with maintaining order and empowered to compel attendance of absent members when ordered.

Session. The period of time in which Congress officially convenes.

Speaker of the House. The presiding officer of the House of Representatives, elected by all members of the House when it convenes for a regular legislative session.

Speaker pro tempore. A representative elected to serve as the presiding officer of the House in the absence of the Speaker.

Special session. A convening of the legislature at a time other than during a regular session. Typically, special sessions are called for the purpose of addressing a specific problem or issue.

Sponsor. The legislator or legislative committee that introduces a measure. The name of this person or committee is printed at the top of the measure.

Staffers. The staff who work for members of Congress. You'll likely meet with staffers during your visits to your representatives' offices.

Standing committee. A permanent committee during a session authorized and named by Senate or House rules.

Statute. A codified law.

Statutory committee. A legislative committee established by statute.

Subcommittee. A subordinate committee composed of members appointed by the chair from the full committee. A subcommittee will consider a narrower range of topics than the full committee, and generally is authorized only to make recommendations to the full committee.

Substitute measure. A measure submitted by a standing committee as a substitute for a measure referred to it. A substitute measure is treated in the same manner as an amendment if it is germane to the title and subject of the original measure.

Summary. The measure summary or digest found printed near the top of a bill.

Sunset clause. A statement added to the end of a measure which causes the act to become ineffective after a certain date.

Table. To stop a bill from further action or to delay a pending question in committee or on the floor. A motion to table is not debatable.

Veto. A procedure established under the Constitution by which the president refuses to approve a bill or joint resolution, thus preventing its enactment into law. A regular veto occurs when the president returns the legislation to the house in which it originated. The president usually returns the bill with a message indicating reasons for rejection. Congress can override a veto by a two-thirds vote in both the Senate and the House. (See also: *pocket veto*)

Vice-chair. A committee member chosen by the Speaker of the House or the president of the Senate to serve as the committee chair in the chair's absence.

Vote explanation. On occasion, a legislator may wish the official record to reflect the reason behind their vote on a particular bill. This vote explanation is found in the journal, following the vote record of a bill.

Whip. A term used to refer to the deputy majority leader. It derives from the British fox-hunting term *whipper-in*, which described the person responsible for keeping the foxhounds from leaving the pack. Whips are responsible for mobilizing votes within their parties on major issues.

Witness. A person who testifies before a legislative committee.

Sample Meeting Request Letter

[Date]

Attn: Scheduler

The Honorable [Name of Senator/Representative/Governor]

[Local or DC Office Address]

Dear [Senator/Representative/Governor] [Name]:

I would like to request a time to meet with you to talk to you about some of the major issues facing individuals with depression and bipolar disorder in [your area].

I look forward to the opportunity to tell you about some of the innovative programs that assist individuals with mood disorders to successfully live in the community. In addition, I would like to discuss with you the current threats safety net providers are facing—threats that could have serious consequences for individuals' access to timely, high-quality treatment in the future.

I would greatly appreciate the opportunity to meet with you in person and am willing to be flexible, based on your schedule of availability. I will follow up with your scheduler in a few days to discuss further. In the meantime, should you have any questions, please don't hesitate to contact me at your convenience [your phone number and email address].

Sincerely,

[Name]

[Agency Name]

Sample Thank You Letter

[Date]

The Honorable [Name of Senator/Representative/Governor]
[Local or DC Office Address]

Dear Senator/Representative/Governor [Name]:

Thank you for your willingness to meet with [name of yourself or your group] and discuss the importance of mental health services to [state/district]. During our meeting on [date of meeting], I shared information about individuals living with depression and bipolar disorder and the public policies that will help facilitate timely access to high-quality treatment.

We know that people with mood disorders can live healthy, productive lives in their communities, but we need the support of elected officials like you to help pass policies that improve community-based treatment. We would welcome any opportunity to serve as a resource to you as you consider policy choices that have implications for community providers such as [name of your agency].

Thank you again for our meeting and I look forward to speaking with you in the future regarding any additional questions you may have.

Sincerely,

[Name]

[Agency Name]

The DBSA Advocacy Training Toolkit was developed by the
National Council for Behavioral Health (TheNationalCouncil.org).

Depression and Bipolar Support Alliance (DBSA)

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