



NATIONAL BOARD FOR  
**CERTIFIED COUNSELORS**<sup>®</sup>  
AND AFFILIATES

# Advocacy 101 Tool Kit

**The NBCC Advocacy Tool Kit** is designed to provide resources and guidance for certified counselors, students, and the public to effectively advocate for the professional counselor community and the needs of counselors' clients. This tool kit aims to enhance the visibility and influence of the counseling profession while promoting the well-being of individuals and communities.



# NBCC Advocacy Tool Kit

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## Advocacy 101 Tool Kit

# Advocate for Counselor Needs

*Because your time is valuable, NBCC intentionally makes it easy for you to advocate.*

## Step I:

Become a member of the NBCC Grassroots Movement, by signing up to the [Grassroots Network](#).

## Step II:

Visit the [NBCC Action Center](#) to sign up for alerts. Once you complete the required information, NBCC will send you tailored advocacy alerts directly to your email. Responding to an alert will take you 5 minutes or less.

## Step III:

While you are in the Action Center, familiarize yourself with the page and bookmark it. The Action Center makes it easy for you to find and respond to alerts that are currently active.



# Effective and Persuasive Advocacy in 5 Simple Steps

As an advocate working to persuade a legislator, preparing in advance is crucial, because it will equip you with the necessary knowledge and strategies to effectively communicate your message. The knowledge you gain through your research, combined with your expertise, makes you an expert advocate who is credible and trusted by the legislator.

## Steps to persuade legislators:

- I. GAIN ATTENTION:** Use the most appropriate method to gain the attention of the legislator and/or their staff.
  - a. Use language the listener can relate to.
  - b. Explain the importance of your topic.
  - c. Use a dramatic story.
- II. EXPLAIN THE NEED:** Inform the listener why the policy is needed.
  - a. Tell them: “The problem we have is . . .”
  - b. Demonstrate the need with information and statistics that are local, with a national comparison when necessary.
- III. PROVIDE A SOLUTION:** Plan a solution to help make your legislator’s job easier.
  - a. Present a plan on how to solve the problem.
  - b. Explain how the plan will work once implemented.
  - c. Provide clear and concise details that fit into the current national trends and political climate.
- IV. HELP THEM VISUALIZE THE BENEFITS:** Illustrate the advantages of your plan.
  - a. Use vivid language to allow your listener to visualize how your plan will benefit constituents and the legislator.
  - b. Use key words/phrases that are relatable to legislators (e.g., impactful, boost the economy, saving lives, improved conditions, healthier community).
- V. ASK FOR ACTION:** Do not leave the conversation without an ask for support.
  - a. Inform your legislator of what they need to do.
  - b. Provide recommendations on how to solve the problem.
  - c. Close with a final appeal—reinforce your message, offer yourself up as a dependable expert, and thank them for their time.





# Connecting With Elected Officials

## Why Connect

Taking the time to educate and empower elected officials with information that will support their constituency base is vital in protecting and promoting the counseling profession. Counselor advocacy helps support a variety of needs, including mental health services, school counseling, funding, and resource allocation. By building these relationships, counselors can ensure that the voice of the profession is heard, as well as the voice of their clients. Collaborating with officials fosters a more informed and supportive environment for counselor legislative initiatives that benefit both the practitioner and those they serve.

## Who Are My Legislators?

To find your legislators visit the [NBCC Grassroots](#) page to use the “View Your Election Center search bar. You may also visit the [Plural website](#) to find both your legislators and legislation from your state.

## Legislative Process Overview

To learn more about the congressional legislative process [view this video from Congress.gov](#).  
At your own pace you may also learn more about:

## Legislative Process Overview

To learn more about the congressional legislative process [view this video from Congress.gov](#).

### At your own pace you may also learn more about:

- [Introduction and Referral of Bills](#)
- [Committee Consideration](#)
- [Calendars and Scheduling](#)
- [House Floor](#)
- [Senate Floor](#)
- [Executive Business in the Senate](#)
- [Resolving Differences in Congress](#)
- [Presidential Actions](#)



# How to Connect

**There are several ways to connect with your elected officials.** You can place a phone call, draft an email, attend a town hall meeting, visit the district office, or schedule a meeting on Capitol Hill. You may also host a site visit to demonstrate firsthand how your organization operates. The most crucial step you can take when connecting is to develop a relationship with the legislators' key staff. They can become your biggest advocate for your issues and deliver your message directly to the legislator.

## Phone Script Template:

Utilize this script for Members of Congress, as well as local and state officials. Please customize to fit your needs and voice.

### INTRODUCTION

- Hi, my name is \_\_\_\_\_, and I am a constituent from [City/State].

### PURPOSE OF THE CALL

- I am calling to discuss a critical issue that I believe deserves attention from [name of member of Congress/state legislator].

### STATE THE ISSUE

- The issue I am concerned about is [briefly describe the issue or legislation, e.g., "mental health funding" or "access to mental health services."]

### EXPLAIN THE IMPORTANCE

- This issue is crucial because [provide one or two key points or statistics that illustrate the significance of the issue, e.g., "Many individuals in our community struggle to access essential mental health services due to funding cuts."].

### SHARE LOCAL IMPACT

- In our community, this issue is important because [describe how it impacts your community and constituents, e.g., "local schools and families are facing increased mental health challenges without adequate resources."].

### CALL TO ACTION

- I would like to encourage [name of member of Congress/state legislator] to [specific action you're requesting, e.g., "support the proposed legislation that increases funding for mental health services."].

### OFFER TO PROVIDE MORE INFORMATION

- I am happy to provide any additional information or resources if that would be helpful. Is there someone I could follow up with about this matter?

### CLOSING

- Thank you for your time and for representing our community. I appreciate the work you and [name of member of Congress/state legislator] do. Have a wonderful day!



# Email Script Template

You may always reach your elected official by email. To reach your member of Congress or a state representative, visit their official website to obtain their contact information or visit [Congress.gov](https://www.congress.gov).

**PRO TIP:** To avoid any delay in your letter being delivered in a timely manner to your elected officials, it is highly recommended that you draft an email rather than write and mail a letter.

Dear Hon. **[Official's Name]**,

Thank you for the work you and your staff continue to perform on behalf of the constituents of **[City and State]**. My name is **[Name]**, and I am **[enter your credentials/or job title and any expertise you have here]**.

I am writing today to express my **[enter your concern or support for the issue here. Describe why this issue is important and share any facts and/or statistics on the issue]**.

This issue is important to your constituency base. **[Share here how this issue directly impacts the community]**.

On behalf of my colleagues and your constituents in the great state of **[State]** I am sincerely asking for your support. You may help by **[enter your request here, clearly state what you are asking the official to do, and suggest ways they can solve the problem]**.

Thank you for taking the time to read my letter. Please reach out to me if you have any questions. I am happy to provide any additional information you may need to help you support this very important issue.

Sincerely,

Sign name

Include contact information



**NOTE:** *When drafting your letter use the same approach you would use with a phone call.*

# Concerned About an Agency Issue?

## *Write an Official Letter*

Official letters are an opportunity for constituents to express their concerns by submitting formal documentation that creates a record of an issue. It also builds awareness and establishes communication with the officials who can advise or support your issue.



For counselors, an official letter may be warranted when a regulation or policy contradicts your training and/or code of ethics. The response you receive may provide clarity and an official record that can protect you and your practice. Official letters to government agencies are important in several ways:

**Create Formal Documentation:** Official letters create a record of your concerns that can be referred to later. This documentation is crucial for accountability.

**Influence Policy:** By voicing concerns in a structured manner, you can influence policy decisions and create awareness about prominent issues.

**Engage in Democracy:** Writing to government bodies is a fundamental way to participate in the democratic process, allowing citizens to express their views and advocate for change.

**Prompt Action:** Official letters can prompt government agencies to investigate issues, respond to public concerns, and take necessary actions.

**Build Community Awareness:** When individuals express their concerns, it can inspire others to do the same, fostering a community dialogue about shared issues.

**Establish a Dialogue:** These letters can initiate communication between citizens and government officials, opening channels for further discussion and collaboration.

**Ensure Legal and Regulatory Compliance:** In some cases, raising concerns officially can ensure that regulatory bodies are aware of issues that may require legal attention or compliance checks.



# FAQs on Official Letters:

## Q. To whom should I address the official letter?

**A.** Determine which government agency is responsible for the issue you are addressing. Once you establish the agency, visit their official website. There, you can find the agency's mailing address, and you may also find the name of the person that heads up the department you are writing to. When in doubt, address the letter to the "Attention of the Secretary."

## Q. What information do I need to include in my letter?

**A.** Writing a letter to an agency official is like writing a letter to your congressperson. At minimum, you should always include:

- details about the issue.
- an explanation of why this issue is important/relevant.
- a request for guidance.
- your contact information—name, address, email, and phone number.

## Q. When should I write an official letter?

**A.** Consider writing a letter when you need to:

- express concerns about a public issue.
- request information or clarification on policies or regulations.
- advocate for policy changes, improvements, or new initiatives.
- formally report a problem, such as discrimination or misconduct.

## Q. Will I receive a response to the letter I send? How long does it take?

**A.** If your letter addresses a specific issue, complaint, or request for information, you are more likely to receive a response. Depending on the agency policy, you may not receive a response. If you do not receive a response within 90 days, it is recommended that you send another letter. You can call; however, calling will not create an official written response, which you may need to protect your rights as a counselor.

**PRO TIP:** Many government agencies have online portals that collect official information from constituents. If the agency has a portal, utilize it to send your letter. Be aware of the word count and write as clearly and concisely as possible with the details needed to get a response from the agency.

**Note on health insurance—related issues:** If you have an issue with a health insurance company and you have engaged with the company but your issue has not been resolved, you have the right to reach out to your state's Department of Insurance (DOI) for guidance and support. Each state has its own [policies](#) that govern insurance; therefore, you must reach out to your [state agency](#).



# Stay Engaged in the Process

It is important to stay engaged and keep up with current events of your elected officials and agencies. Consider doing the following to stay up to date in your state:

## Use Technology

**Social media:** Follow your legislators and agencies on their social media platforms of choice. You can easily find the platforms they use by visiting their official websites.

**Newsletters:** All legislators and agencies have a newsletter. You can sign up to receive electronic newsletters by visiting their official websites.



## All Politics Is Local

**District Staff:** Take the time to get to know your legislators' district staff. Their responsibilities are different from staff in Washington, D.C. District staff can help you with local issues and connect you with D.C. staff if your issue needs to be elevated to the congressional level.

**Community Meetings:** Legislators and agencies host community meetings to provide updates and hear directly from constituents about their concerns. Use this platform to meet and talk with your legislators. These meetings are an opportunity to strategically become an expert your legislator may rely on.

# Rules to Know When Advocating as a Nonprofit Organization



## Nonprofit organizations **CAN**:

- engage with legislators and their staff to seek their support for your issues.
- advocate for or against legislation and regulatory proposals.
- advocate for or against ballot measures that directly affect the counseling profession.

## Nonprofit organizations **CANNOT**:

- endorse or oppose a candidate for public office.
- make monetary donations to a candidate.

**NOTE:** You will always have the right to endorse or oppose a candidate as a citizen and constituent, but you may not do this while representing your nonprofit organization. You may also make monetary donations in your name, but not in the name of your organization.



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**The Internal Revenue Service (IRS) sets the legal limits for nonprofit organizations.**

**Please take time to familiarize yourself with the IRS rules found on the IRS website:**

- [Lobbying | Internal Revenue Service \(irs.gov\)](https://www.irs.gov/charity-nonprofit/lobbying)
- [Measuring lobbying: Substantial part test | Internal Revenue Service \(irs.gov\)](https://www.irs.gov/charity-nonprofit/lobbying/substantial-part-test)
- [Measuring lobbying activity: Expenditure test | Internal Revenue Service \(irs.gov\)](https://www.irs.gov/charity-nonprofit/lobbying/expenditure-test)

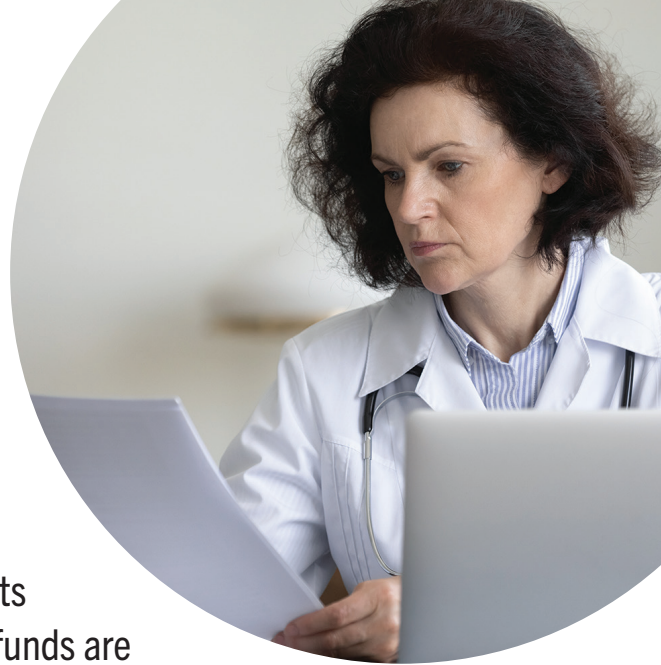


# False Claims Act (FCA)

## What is the False Claims Act (FCA)?

The FCA is a federal law used to recover funds that have been paid when an individual or group submits a claim that is false or fraudulent, including claims submitted to the Centers for Medicare & Medicaid Services (CMS).

The purpose of the FCA purpose is to prevent fraudulent acts and to safeguard taxpayer dollars by ensuring government funds are reimbursed properly.



## Key proactive actions counselors should take to stay compliant with the FCA:

**Regularly Audit Billing Practices:** Conduct internal audits of billing activities to ensure claims accurately reflect services provided. Professional counselors should verify that all services billed were genuinely rendered.

**Protect Patient Information:** Avoid identity theft risks by securely managing and storing patient information. Misuse of patient identities for fraudulent billing can lead to severe legal consequences.

**Implement Strong Compliance Protocols:** Develop and follow detailed policies and procedures for billing and coding compliance. Ensure that all claims are submitted in accordance with both Medicaid and insurance requirements.

**Provide Documentation for All Services:** Maintain comprehensive documentation of services provided, including session notes, patient consent, and time spent with patients, to back up every claim.

**Stay Educated on Coding Regulations:** Professional counselors should receive ongoing training on the latest coding regulations and requirements to avoid errors or misinterpretations that could lead to fraudulent claims.

**Use Compliance Software:** Consider using billing and compliance software to monitor claims and ensure adherence to coding rules, thus reducing the risk of inadvertent mistakes or deliberate fraud.





# Resource Bank

## *Links to Support Your Efforts*

- [Government Affairs Newsroom](#)
- [NBCC Grassroots Action Page](#)
- [Ethical Principles for Artificial Intelligence in Counseling](#)
- [NBCC Code of Ethics](#)
- [Resources for National Certified Counselors](#)
- [Lobbying Rules](#)
- [Measuring Lobbying: Substantial Part Test](#)
- [Measuring Lobbying Activity: Expenditure Test](#)
- [Legislative Process Videos](#)
- [Health Insurance Regulatory Guidance](#)
- [Insurance Commissioner Finder](#)





## Contact the NBCC Government Affairs and PARC Team

**Government Affairs email:** [govtaffairs@nbcc.org](mailto:govtaffairs@nbcc.org)

**Policy, Advocacy, and Research in Counseling Center email:** [parc@nbcc.org](mailto:parc@nbcc.org)

**Phone:** 1.336.587.1646

**LinkedIn:** [the-national-board-for-certified-counselors](https://www.linkedin.com/company/the-national-board-for-certified-counselors)

**Facebook:** [NBCCandAffiliates](https://www.facebook.com/NBCCandAffiliates)

**YouTube:** <http://www.youtube.com/@NBCCandAffiliates>



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