NATIONAL COUNCIL
FOR BEHAVIORAL HEALTH

FOSTERING RESILIENCE AND RECOVERY:

A Toolkit for Trauma-Informed Primary Care Advocates

"If not us, who?
If not now, when?"
– Hillel the Elder

Legislators, regulators and funders make decisions every day that will either help improve access to care for those who need it or make it more difficult for your organization to serve your community. If we, as advocates, don't speak up, they will make those decisions without a complete understanding of what their choices mean for your patients.

This handbook will help you focus your power as an advocate and use it in the most effective way possible to advance trauma-informed approaches in public policies and programs to strengthen the safety net and expand access to care.

The Top Three Things You Can Do Right Now

1. Get to know your legislators, regulators and funders, and their positions on your issues
2. Introduce yourself and your organization via e-mail or in-person
3. Attend upcoming community events or town halls, or invite your legislator to visit your agency

How to Use this Toolkit

The toolkit is designed so that you may begin anywhere and use some or all of the suggestions. You can read through the entire handbook to get a broad understanding of how to be an effective advocate. Or you can dive into specific sections, such as how to have an effective meeting with your legislators, regulators and funders. Feel free to pull sections or resources from the toolkit and disseminate among your legislators, regulators and funders or clients.

A TOOLKIT FOR TRAUMA-INFORMED CARE ADVOCATES

TABLE OF CONTENTS

EFFECTIVE ADVOCACY: Do Your Homework and Create a Sense of Urgency

Over 200 million communications, mostly electronic, reach the U.S. Congress, state-level regulators and funders every year. Legislators, regulators and funders receive many competing messages on a wide variety of issues affecting their constituents. Doing some advance preparation will help you ensure your message is heard.

Know What Matters

Legislators, regulators and funders do not generally have predetermined views on trauma-informed care. For that reason, advocates play an important role in educating them about the right choices to make.

What Motivates Legislators, Regulators and Funders:

- Compelling **personal stories** told by clients/patients. These provide an emotional hook and an engaging way for them to talk about the issue with their colleagues and the press. See Crafting a Compelling Story for a template for how to do this.
- Data about the **economic impact** a policy would have on their district or state
- Data or stories about how that **policy could make life better** for people they are responsible for.
- 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.

REMEMBER

Just because your recommendation is a good public policy, that isn't always sufficient to win support. They need to know that it's important to large numbers of people/voters, to the wellbeing of their constituents, and to the economic health of their district/area of responsibility. As former Senate Majority Leader Everett Dirksen said, "When I feel the heat, I see the light."

Know Your Audience

Knowing where your legislators, regulators and funders stand will help you talk about trauma in terms that are most likely to resonate. ***Learn about their views on key issues.***

- Are they a long-time supporter of mental health and substance use issues? Do they have a personal or family history of mental health, addiction, trauma or primary care?
- Are they a fiscal conservative focused on return on investment?

- Is it their priority to bolster the safety net, health care and social services?
- Are they a veteran?
- Have they championed issues for older adults?
- Are they focused on improving population-based health outcomes?

The staff of a Senator or Representative, regulator or funder are of tremendous importance, as they do much of the hands-on work. Staff will often have issue-area expertise, and legislators, regulators and funders rely on them for advice and guidance when it comes to taking positions on particular issues and making fiscal or programmatic changes. To have maximum impact, you will need to **cultivate strong relationships** with staff.

Know Your Issue and Objective

As you plan for a scheduled meeting or prepare to send correspondence:

- Develop a clear understanding of what you hope to convey and what you want to accomplish
- Have a clear "ask" — something specific you'll be asking the legislator, regulator or funder to do
- Prepare to share a story to put a human face on the issue
- Prepare to answer questions on the issue or know how to get answers
- Know the arguments for and against the issues you want to discuss
- Address objections your opponents are likely to raise
- Consider developing a one-page summary of the issue or legislation

Advocacy Tools for this Section: • Crafting a Compelling Story Template

WHO YOU ARE, WHAT YOU DO: Introduce Your Organization

Most legislators, regulators and funders and their staff know little about primary care, trauma, community-based mental health and substance use treatment. ***That's not a bad thing.*** It gives you the opportunity to fill them in, to teach them what they need to know about your issues and to be considered as an expert. Your introduction is your chance to help them see your passion, your personal story, and/or your impact. Be prepared to provide basic information and any other information that will give your legislators, regulators and funders an idea of what your organization does.

Example "We serve people in counties in your district. We employ people. We help__________."

For consumers or family members, be prepared to share a brief statement about why you're passionate about trauma-informed primary care, mental health and/or addiction. You don't have to tell your whole story but sharing a small piece of it will help your legislator, regulator or funder and their staff understand why behavioral health issues are important to people in your community.

Example "I receive(d) services at _______________. Before that, I ___________. Now, I ___________."

Information to Share:

You may not be able to get to all the items below in the short time you have to introduce yourself and your agency. You should consider which you think might be the most important or influential to the individual(s) you are meeting.

- Where do you live in their district and how long you have resided there?
- Where are your organization's programs located?
- Who does your organization serve?
- What impact does trauma-informed care have on people's health or lives? For example, reduced hospitalizations, increased employment, etc.
- Is your organization locally governed? How does it meet local needs?
- Are there any board members the individual(s) might know?

- How many people does your organization employ? How many does it serve? How does your work contribute to a stronger and safer community? When did you implement trauma-informed practices? What were the results?
- Why are federal and state investments in your services and community-based organizations a good allocation of taxpayer dollars? What barriers do you face in providing services in their area of responsibility?
- What can they do to help you succeed?
- Do you have anything in common with the individual(s) you are seeking to influence- went to the same school, form the same hometown, mutual friends, etc.?
- Is there anything they have done in the past that was especially helpful to you or your organization?

REMEMBER

You don't have to give a lecture when you're introducing yourself.

You'll have plenty of time to share more info later in the conversation. Aim for a 30-second introduction that illustrates your relevance to them and the issues at hand. Don't forget to practice!

Organization Fact Sheet

Consider developing a one-page document that will provide the information recommended above and can be referred to by the legislator, regulator, funder or staff at a later date. This will allow you to refer to the document in your introduction and leave time to make a more personal connection. This document should be simple and concise. Use images and graphics that will grab attention. Refer to the Resource, Introducing Your Organization for a template to develop one.

Advocacy Tools for this Section: • Introducing Your Organization Template

A STRONG TEAM: Recruit Allies to Help Make the Case

The messenger is important, and, sometimes, the smartest and most effective thing you can do as an advocate is to step back and let someone else make the case on your common issue or goal. Based on what you know about your legislators, regulators and funders' interests and concerns, think about additional allies you can recruit to help deliver your message.

Utilizing the Voice of Lived Experience

Utilizing the voice of lived experience can be an extremely powerful tool. All legislators, regulators and funders do not have the same needs and respond to different kinds of information in different ways. There are those who only need to hear a few testimonials before they are sold on a concept or program and ready to move forward. Others want to know the data demonstrating the success of a program. Others are motivated by capturing their heart through stories of struggles and harsh treatments ending with hope. These stories are the inspiration they need to act. This is where the voice of lived experience comes in best. Work with patients who have experienced trauma on telling their story using the Crafting a Compelling Story template and have them come with you to your meetings or have them present on the site visits.

Other Potential Allies

- Local departments of health
- Local social support services
- Community-based behavioral health organizations
- Other nonprofits who serve your clients
- Law enforcement
- Criminal justice
- Child welfare organizations
- Veterans organizations
- Hospital executives or emergency department physicians

Steps to Engaging New Partners

- Join other coalitions with other like-minded agencies and organizations as members.
- Build relationships with other groups and individuals so that the first time they are hearing from you isn't with an advocacy ask.
- Send an e-mail outlining the problem your community faces, your proposed solution, and what they can do to help.
- 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.

Potential Asks for Partners

- E-mailing or calling their legislators, regulators and funders in support of your cause or organization
- Writing a letter to the editor of their local paper
- Attending a local meeting or event organized around this issue
- Signing a petition
- Signing on to group letters of support for a particular issue
- Disseminating information about your cause to their networks
- Forwarding your call to action via e-mail and social media
- Helping you make connections with key legislators, regulators and funders, other community organizations, and other potential allies

Things to Consider When Working with Other Advocates

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 trauma 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. While you can never please everyone, it's often helpful if you have the flexibility to make minor adjustments 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 e-mail networks.

Stay connected. 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.

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 trauma-informed services.

Advocacy Tools for this Section: • Crafting a Compelling Story

IT'S NOT JUST ONE MEETING: Build Relationships

If your legislators, regulators and funders ***know you as a voter, constituent, friend and supporter,*** they are likely to be more responsive to you than if you only contact them when you are in need. The best time to get to know your legislators is back home, when they are less distracted by the business of Congress. Visit your Senator or Representative to get to know them better and educate them about trauma and trauma-informed primary care. You can get to know funders and regulators through meetings, stakeholder groups, and events they may have.

Connecting with all of your legislators is important even if you didn't vote for them or if they disagree with you on some policy issues. If legislators, regulators and funders don't seem to care about trauma and trauma-informed care policy, it doesn't mean you should ignore them. Rather, you need to make more of an effort to educate and influence them about the importance of your issues. But you don't need to have a friendship or strong relationship with all your legislators, regulators and funders. In fact, it may be most beneficial to focus more of your time on one legislator who is most interested in healthcare or who has an important leadership or committee position. The National Council staff can help you determine who these legislators, regulators and funders are.

Ten ways to build relationships with Legislators, Regulators and Funders:

1. **Invite them to an event you are hosting or to your office or facility for a site visit.** This allows them to get a first-hand understanding of the work you do and how it matters to the people you serve.
2. **Help generate positive media attention** when legislators, regulators and funders visit your organization by working with their staff to develop and submit a press release with photos.
3. **Attend in-district events such as town hall meetings.** These are a great way to bring your issues to their attention and speak with them personally.
4. **Establish yourself as a helpful expert** that their staff can turn to when they have questions about an issue. Provide useful, balanced information that informs and establishes you as a person they can turn to when they need to know more.
5. **Help legislators, regulators and funders when their constituents have a health-related issue** by being available to answer any questions they or their staff might have.

STAY IN TOUCH

Don't wait until you need something from your legislators, regulators and funders to communicate with them. Let staff know if you or your organization are featured in a recent news story or share a new report that highlights how a policy might affect your community. But be judicious! Don't be the person who is clogging staff inboxes.

6. **Say thank you.** Legislators, regulators and funders and their staff are constantly bombarded by requests and demands, often couched in less-than- polite terms. Showing appreciation for their position or vote on a particular issue means a lot to legislators, regulators and funders and staff.

7. **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 or when a regulator or funder supports the advancement of your issues through funding or policy changes.

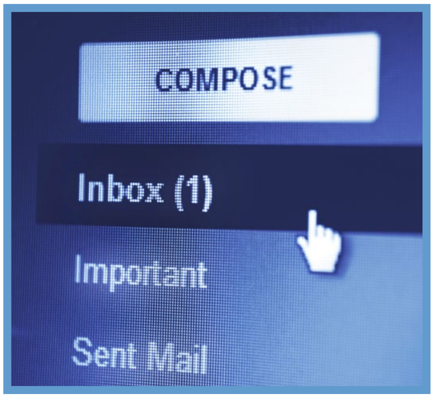
8. **As a private citizen, contribute to and/or volunteer for campaigns of your choosing.** This shows legislators that you support the work they're doing in Washington and gives you additional opportunities for interaction and relationship building. (Note: keep in mind that nonprofits are bound by different 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.)

9. **If you wish to personally host a fundraiser, work with the legislator's campaign staff — not their Senate or House staff — on the details.** Remember that if you are hosting a fundraiser, it must be in your role as a private citizen, not a representative of your organization.

10. **Participate in local or state-level stakeholder groups.** Many funders and regulators have advisory councils or stakeholder groups regarding services and programs. Offer to represent your service sector on their stakeholder group. Be an active member, offering support and expert knowledge when it is needed.

E-MAILS, CALLS, SNAIL MAIL: Stay in Contact

Because of enhanced security and screening measures, USPS mail sent to the Capitol or state regulators' offices can be delayed for days or weeks. E-mail is the most efficient way to communicate with your legislators, regulators and funders. Focus your attention on your own legislators, regulators and funders and those whose constituents are served by your organization. Staff keep a tally of the contacts 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.



The volume of e-mail staff receives increases every day, so building and maintaining personal relationships is increasingly important. It is often said that the most important aspect of an e-mail is the "from" line.

Tips for E-mailing

- If you know the name of the staff person responsible for health/behavioral health issues, address the e-mail to them personally. If not, send the e-mail to the legislator, regulator or funder using the general contact form provided on their website, and it will be routed to the appropriate staff person.
- Remember to include your home address or your organizational address in the e-mail. The e-mail means more coming from a constituent or an organization providing services to their constituents.
- Keep the message short and to the point and be sure to proofread. Use appropriate grammar and avoid typos.
- Use the person's title and last name (e.g., Dear Senator Stone) in the salutation line. Avoid generic terms, such as decision maker or Senator.
- Tell your legislator, regulator or funder 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, make changes to billing policy ABC to include trauma or trauma-informed care clinical practices).
- Support your request with two or three sentences of relevant facts, avoiding jargon and acronyms that they may not understand.
- Share the number of people in their district or territory of responsibility who will be affected and how by the proposal under consideration.
- Remind your legislator, regulator or funder of your expertise on the issue (years of experience in the field, with your current employer, and other professional or community involvement).
- Use a polite tone and avoid things like all caps that can seem negative or threatening.
- Politely request a commitment for their support.

- Attach any relevant materials, such as one-pagers about your organization or the issue area you are writing about.
- If you don't receive a written reply or telephone response to your e-mail or letter within a month or so — e-mail or write again and enclose your original message.
- Once you get a reply, be sure to thank the person who sends it to you and commit to remaining in touch with her or him.
- If you receive a response with which you disagree, e-mail or write your legislator again and politely commit to remaining in touch on this important issue.
- If you get a form letter back that doesn't address the concerns you raised, don't be discouraged. Seek out staff to meet with to talk about your organization's work and share how the policies you raised would affect your clients. Relationship building takes time!

Finding the Right E-mail Address

Most legislators, regulators and funders have submission forms on their websites for sending messages to their office. These messages are sorted by issue category and routed to the appropriate staff. For funders and regulators, each organization may have a different format for their e-mail addresses. You should be able to call the organization and receive the correct e-mail addresses. As for legislators, you can also obtain e-mail addresses for specific staff by calling the legislator's main Washington, DC office. The Senate and House use similar formats for e-mail addresses.

Senate offices use:

firstname_lastname@senatorlastname.senate.gov (Example: joe_smith@anderson.senate.gov)

Representative office use:

firstname.lastname@mail.house.gov (Example: mary.jones@mail.house.gov)

Tips for Calling

Telephone calls to legislators, regulators and funders and staff are important, especially when a bill is nearing consideration in a subcommittee or committee or on the floor. Calls are also much harder for staff to ignore than e-mails and often help an issue rise to the top of the staff priority list. A coordinated calling campaign from constituents can be very effective to ensure that the legislator, regulator or funder hears about the issue and is often more influential with staff than an e-mail campaign.

All DC legislative offices can be reached through the US Capitol switchboard at (202) 224-3121. If you want to get a hold 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.

For regulators and funders, their phone numbers should also be found on the contact us page on their websites. Remember, whether calling a legislator, regulator or funder:

- **Be prepared.** Understand that you will not speak directly with the legislator; instead, you will need to leave a message. If you know the name of the staffer who handles health/behavioral health issues, leave a specific message for them.
- **Be polite.** Staff work hard to answer the phones all day long. 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 connection 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."

Social Media

Most legislators, regulators and funders maintain Twitter feeds and Facebook pages. You should "like" their page on Facebook and follow them on Twitter. However, legislators, regulators and funders rely less on social media to collect information from their constituents. E-mail, phone, and in-person visits are the best way to communicate your policy priorities and ask your legislators, regulators and funders for their support.

Twitter and Facebook may function more importantly as a means for legislators, regulators and funders 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, regulators and funders appropriately in your posts, you may be able to alert legislators, regulators and funders and their staff to conversations about important policy issues. Following your legislators, regulators and funders on social media will provide information on their interest areas, positions, and priorities. You can also find out what events they may be hosting or attending.

THE GOLDEN TICKET: Tip for Effective Advocacy Meetings

There is no substitute for the opportunity to communicate face-to-face with your legislators, regulators and funders. 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. Don't be intimidated — they want to hear from their constituents and those you serve.

Before the Meeting

- Only schedule meetings with your own elected officials or those whose constituents you serve. For regulators and funders, only schedule meetings with those that have direct authority over the policies or funding in which you would like to discuss.
- Do your best to have a constituent attend the meeting with you. Let the office know who will be coming with you and their role or interest in the area, note all constituents who will be in attendance.
- Use the meeting request process on their website three or four weeks in advance. If at all possible, avoid requests that are last minute (anything less than a week). See Requesting a Meeting — template for a template letter you can use as an e-mail request.
- Include the one-page introduction sheet in your e-mail. See Introducing Your Organization — template for a template.
- Follow-up by phone to be sure your request was received. Avoid sending multiple e-mail requests for the meeting. The schedulers are juggling a lot of requests and may take a little while to get back to you.
- Do your homework. As stated above, know who you are meeting with and their position on your issues.
- Pick your "ask" and select supporting points or stories you want to share. It is better to focus each meeting on one issue than to bombard them with multiple requests.
- Don't hesitate to meet with staff if the official is unavailable.
- Show up ten minutes early. Never be late yourself, but be understanding if the legislator, regulator, funder or staff are late.

During the Meeting

- 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 cosponsor to H.R. 1" is better than "Please support prevention policies."
- Tell them a little about yourself and your organization.

- Leave time for the constituent to speak at the meeting. These are the attendees the official is most interested in hearing.
- Answer questions the official or staff may have. If you aren't sure of the answer, tell them that you will find it and get back to them. Never provide inaccurate or false information.
- 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.
- Invite them to an event or a site visit so they can see firsthand what you are all about.
- Thank them for their time and ask what you can do for them.

After the Meeting

- Always send a brief thank you within a day or two of your meeting. Refer to Meeting Follow-up for a helpful template.
- In the same e-mail, offer to answer any additional questions.
- Send the documents you provided during the meeting if you weren't able to send them before the meeting.

Advocacy Tools for this Section:
- Introducing Your Organization — template
- Requesting a Meeting — template
- Meeting Follow Up — template

STAY CONNECTED

The weeks when Congress or State Regulators are not in session are an excellent opportunity to build relationships outside of the busy legislative session.

Attend a Town Hall or Stakeholder Meeting

Town hall meetings are often held at a local gathering place. Attending one will give you the opportunity to ask questions of your officials and voice your opinions on the issues. Sometimes, the meeting might be devoted to a particular issue, such as during the summer of 2009 when legislators around the country held town hall meetings on health reform.

Some legislators, regulators and funders are taking advantage of technology 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. Others are also turning to Twitter to hold Tweet Chats, where anyone can participate in the dialogue by using a common hashtag. You can find out about upcoming meetings or chats by checking the official's website or by following them on social media.

Organize a Site Visit

Invite your legislators, regulators and funders to visit your site so they can see the great work your organization does in their community.

Suggestions for Site Visits:

- Invite the official in person, by letter, telephone or e-mail either directly or through staff depending on how well you know the official. Refer to Site Visit Request for an e-mail invite template.
- Plan your time with the official at your organization carefully as they are often on a tight schedule. Find out who will be accompanying the official on the visit.
- Brief employees who are to be involved in advance about what is expected of them and how they can help you stay on schedule.
- Consider asking clients and family members to spend a few minutes with the official and share their stories. See the section on Crafting a Compelling Story for helpful tips.
- Have a photographer take pictures for use in the official's newsletter or website and make them available to the local press.
- Assist the official's office in writing a press release to be sent to local media along with photos, or if the official prefers, issue one from your organization.
- Follow-up with a thank you letter to the official after their visit.
- Stay in touch... keep the official and staff informed about issues important to your organization.

Organize a Community Event

Organizing a community event with your legislator, regulator or funder can be time consuming, but is valuable in establishing or strengthening your relationships with the 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. Much of the preparation for a site visit is required for a community event.

Additional suggestions:

- When you invite your legislator in person, let them know the purpose of the meeting and who will be there.
- Invite other organizations and community members who share your goals or advocacy agenda.
- Be sure to approve any additional speakers with the legislators, regulators and funders.
- Brief attendees to be involved in advance and stay on schedule.
- Draft materials to explain the issue and highlight any tasks.
- Invite local media to attend the event, but be sure to check with the official first.
- Understand that staff may attend in the official's place.

Advocacy Tools for this Section:

- Requesting a Site Visit — template
- Crafting a Compelling Story

RESOURCES AND TEMPLATES

1. TIC Business Case Literature Review — National Council, August 2017
2. Introducing Your Organization — template
3. Requesting a Meeting — template
4. Requesting a Site Visit — template
5. Meeting Follow Up — template
6. Crafting a Compelling Story
7. What to Do When an Official Says...

TIC BUSINESS CASE LITERATURE REVIEW
National Council, August 2017

The Business Case for a Trauma-Informed Approach
A Brief Literature Review (August 2017)

To meet the triple aim of patient satisfaction, improved health outcomes and decreased costs, service providing organizations and systems, along with communities, should consider using a trauma-informed approach. This promising approach to organizational structure and treatment delivery, often also referred to as trauma-informed care, seeks to realize, recognize and respond to the widespread impact of trauma and to prevent re-traumatization (SAMHSA, 2015). Rooted in the Adverse Childhood Experiences study (ACES), there is a wide body of research that demonstrates an association between traumatic childhood experiences and poor health outcomes in adulthood (Felitti et al., 1998). In fact, the greatest individual predictor of health care spending, utilization and outcomes is the number of adverse experiences sustained in childhood (Brenner, 2015). Individuals exposed to violence are not only more likely to have diabetes, heart disease, mental illness and asthma but their symptoms are often more severe (Dolezal, McCollum & Callahan, 2009). And, individuals who have experienced trauma have been shown to be more likely to utilize costly health care services compared to individuals without a trauma history (Raphael, Zhang, Liu, & Giardino, 2009).

In the United States, it is estimated that child abuse costs $5.87 trillion dollars (Institute for Trauma and Trauma-Informed Care, 2016). Putting underlying childhood adversity at the forefront of treatment and service provision could significantly cut costs, help to retain staff and contribute to better clinical outcomes (Dolezal, McCollum & Callahan, 2009). In Washington State, a 2009 study by the Washington Family Policy Council found that counties using trauma-informed care in their schools and social services saved $1.4 billion over a decade (Mongeau, 2017).

Domino et al. (2005) completed a highly-cited research study that proves cost effectiveness of using a trauma-informed approach for women with co-occurring mental and substance use disorders with a history of violence. The research found that without expending additional funds, better clinical outcomes could be achieved with a trauma-informed approach. A research study completed in Australia by Adults Surviving Child Abuse determined the economic impact of unresolved childhood trauma costs the Australian government $9.1 billion annually (Browne, 2015). The key recommendations from the report were to improve training for health care providers so they could identify underlying trauma and make appropriate referrals, to raise awareness of the possibility of trauma in patients, and to increase investment in specialist services, including helplines and online services.

The Center for Healthcare Strategies identified trauma-informed care to be effective with difficult to engage Medicaid populations (Davis & Maul, 2015). This population is small but expensive due to a complex mixture of physical conditions, behavioral health needs and environmental circumstances like homelessness that result in inordinate numbers of hospital visits. Davis & Maul noted that using a trauma-informed approach can help providers build trusting relationships with individuals and may enhance quality and cost effectiveness for Medicaid programs. This approach is cost effective with child and adolescent populations. For children and youth served in a trauma-informed care facility in Maine, inpatient mental health services decreased by half, from 18% to 9%, and Medicaid inpatient hospital costs decreased by approximately $122,000, yielding a 51% savings (Stroul et al., 2015). For populations who use substances, a 2007 study found that a trauma-informed approach in substance use treatment increased retention rates as the intervention group was 31% less likely to discontinue treatment within four months (Amaro et al., 2007).

Maintaining qualified staff not only decreases costs related to turnover but also improves patient satisfaction. A trauma-informed organization has lower rates of staff turnover and lower usage of sick leave (Baker & Brown, 2016). Additionally, workforce development for trauma-informed care is relatively low-cost and high-yield (DeCandia et al., 2014). There is also opportunity to remove redundancies in assessment processes. The return on investment for a hypothetical 100 clinician agency (assumes a clinician cost of $75.00 per hour, a trauma assessment time of one hour, an annual readmission rate of 30%, and an average clinician caseload of 90), is $225,000 per year in increased productivity, based solely on the fact that they will not duplicate trauma assessments for readmitted clients (Calhoon, 2016).

Despite all this data supporting the use of a trauma-informed approach, research on detailed cost-effectiveness of using it in service delivery and organizational management is still in the early stages. Currently, two long-term pilot projects are underway to prove the return on investment and effectiveness. The Center for Healthcare Strategies (2015) is overseeing a pilot program of six organizations implementing a trauma-informed approach focusing on patient outcomes, decreased costs and increased staff resiliency. The Administration of Children and Families Children's Bureau funded a five-year pilot study with five organizations across the U.S. to provide child welfare services in a trauma-informed manner (DeCandia et al., 2014). The results from these pilots are expected to affirm the current data, that a trauma-informed approach can improve patient satisfaction and outcomes while decreasing overall costs.

REFERENCES

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Introducing Your Organization — Template

Guide to Creating a One-pager on Your Organization

Providing a one-page fact sheet about your organization is a great way to familiarize your legislator, regulator or funder with who you are, who you serve, and what impact your services have on your community. This fact sheet should tell your legislators, regulators and funders at a glance all the most important things they need to know about the difference you make in people's lives – both as an employer and a provider of health care services. Make it fun: You can include your mission statement, interesting information about your organization, and even a picture!

Need ideas about what to say? Here are some examples of what information to include.

Organization

- Organization Website
- Contact Information for Organization

Size of Organization

- What kind of organization are you? (e.g. a community mental health center, addiction treatment organization, hospital, primary care practice, FQHC etc.)
- Number of staff employed
- # of beds (if applicable)
- # of locations
- Counties/cities served
- Annual budget

Clients Served

- Demographics of Clients Served
- Number of Clients Served
- Diagnostic mix Medicare/Medicaid numbers served (or % served)
- Number of veterans/military members served

Services Provided

- Primary Care, Dental, Vision, etc.
- Therapy/Substance treatment/family/child, etc.
- Residential, Employment, supportive housing, detox, etc.
- How your clients benefit from your services
- Explain how your services help clients lead full and productive lives in recovery and/or wellness.
- Consider telling a story of one client who did especially well.

Remember to keep it brief and easy to read! (Think pictures, a map of your service area, bulleted lists, creative subheadings, etc.) Don't forget to include your name and contact information so they know how to follow up with you.

Avoid jargon! Staff typically do not have much background in direct service delivery and will not have an intuitive understanding of what terms like, "cognitive behavioral therapy" or "family psycho education." Use easily understandable layman's terms to explain not just what services you provide, but what impact they make in clients' lives.

Requesting a Meeting — Template

[Date]

Attn: Scheduler

The Honorable **[Name of Senator/ Representative/ Governor/ Regulator/ Funder]**

[Local or D.C. Office Address]

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

I would like to request a time to meet with you to discuss **[insert specific issue or policy concern]** and how this impacts our ability at **[Name of Organization]** to provide services for individuals with trauma, health, mental health and substance use conditions in **[Your Organization's Service Area]**.

[Name of Organization] employs **[Insert number of]** staff who serve **[Insert number of]** individuals (or families) in **[Service Area]** through varied programs **[insert short description of programs or services]**. I have attached a brief fact sheet with more detail about our services, clientele and areas served. **[If you do not have a fact sheet, then insert a couple of sentences addressing these areas. You can also insert a sentence or two about a specific program or clientele served that you want to highlight.]**

We look forward to the opportunity to meet with you in person to share information about our innovative programs that help our clients live independent, productive lives and keep our communities safe and strong. I am able to be flexible for both the time and place of the meeting, based on your schedule. We would be happy to schedule a meeting at your office if that would be more convenient. I will follow-up with your scheduler in a few days to discuss further. In the meantime, should you have any questions or if I can be of service, please don't hesitate to contact me at your convenience **[Your phone number & e-mail address].**

Sincerely,

[Name]

[Organization Name]

Requesting a Site Visit — Template

[Date]

Attn: Scheduler

The Honorable **[Name of Senator/ Representative/ Governor/ Regulator/ Funder]**

[Local or D.C. Office Address]

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

I would like to invite you and your staff to **[Name of Organization]** as your schedule permits. Our Board of Directors, clients and staff are excited to give you a tour of the organization and share information with you about the services we provide to the **[Your Organization's Service Area]** community. **[Name of Organization]** employs **[Insert number]** staff who serve **[Insert number of]** individuals (or families) in **[Service Area]** through varied programs **[insert short description of programs or services]**. I have attached a brief fact sheet with more detail about our services, clientele and areas served. **[If you do not have a fact sheet, then insert a couple of sentences addressing these areas. You can also insert a sentence or two about a specific program or clientele served that you want to highlight.]**

We would appreciate an opportunity to share information with you about our innovative programs that help our clients live independent, productive lives and keep our communities safe and strong. My staff and I look forward to the opportunity to host you and your staff at **[Name of Organization]** and are willing to be flexible, based on your schedule. I will follow-up with your scheduler in a few days to discuss further. In the meantime, should you have any questions or if I can be of service, please don't hesitate to contact me at your convenience **[Your phone number & e-mail address]**.

Sincerely,

[Name]

[Organization Name]

Meeting Follow Up — Template

[ON YOUR ORGANIZATION TEMPLATE]

[Date]

The Honorable **[Name of Senator/ Representative/ Governor/ Regulator/ Funder]**

[Local or D.C. Office Address]

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

Thank you for taking the time to meet with me and the **[Name of your Organization]** team to discuss the importance of trauma-informed primary care services to **[State/Service Area]**. During our meeting on **[Date of Meeting]**, I shared information about our organization, the services we offer, and the challenges we face in meeting our clients' needs.

We also discussed **[insert topic of the meeting]. [Address any follow-up you agreed to do: answers to member questions, future meetings, provide additional information]**.

We are grateful for the continued support from officials like you. This support enables us to achieve our mission of providing high-quality evidence-based services that meet the needs of individuals with physical health, mental health and substance use problems. We would welcome any opportunity to serve as a resource to you as you consider policy and program choices that have implications for community providers such as **[Name of your Organization]**. Thank you again for our meeting, and I look forward to speaking with you in the future regarding any additional questions you may have. Please let me know if I can ever be of service to you.

Sincerely,

[Name]

[Organization Name]

Crafting a Compelling Story

Whether you are talking to a reporter, a regulator, a funder or a legislator, stories about the people you serve and the work you do are the most important part of the conversation. They get to the "why we exist" question, engage the audience and help people remember the program details you slip into the story the way you slide spinach into your lasagna without the kids knowing.

When telling your story, keep the following questions in mind.

Who Is Your Storyteller?

- Your organization's staff
- Your organization's board or members
- Consultants
- Clients and patients

Who Is Your Storyteller?

- Clients and patients
- Your organization's staff
- Other health care providers
- Media
- Policymakers or legislators
- Funders and potential funders
- Your organization's board

How Do You Want Your Story to Move Your Audience to Action?

- Seek your services
- Recognize you/your staff as experts on the topic
- Become members
- Consider funding future initiatives
- Advocate for a policy change
- Take another action related to your organizational goals

THINK OUTSIDE THE BOX

Could your storyteller be a sheriff? A teacher? A corrections officer? A client turned staff? Different storytellers may resonate more deeply with different audiences.

When Should Your Story Be Shared?

Since your stories are designed to support specific organizational goals, it is helpful to plan when the ideal time would be for your target audience(s) to hear your story. For example, you'd want a legislator to hear about how important Medicaid funding is to your ability to serve clients as they are considering potential legislation that would impact Medicaid. Think of any major deadlines, special events or milestones for you or your target audience.

Where or How Can You Tell the Story?

A good story only has impact if it is shared. Share stories regularly with your staff, clients and other key audiences. Include stories everywhere: in marketing materials and newsletters, on your website and social media accounts, or in letters to the editor. Don't rely just on words, use visuals, including photos, quotes and memes.

How Does this Story Relate to Your Work/Others?

What other organizational initiatives or timely topics does your story touch upon?

How does your target audience get information? In what ways do you already communicate with this audience? Check all that apply.

- ☐ Print — direct mail
- ☐ Presentation
- ☐ E-mail
- ☐ Newsletters
- ☐ Media (press release, op ed)
- ☐ Website
- ☐ Social Media
- ☐ Blog
- ☐ Video
- ☐ Webinars
- ☐ Special organizational events

What to Do When an Official Says...

During your meetings, legislators, regulators and funders will have a variety of reactions. The examples below provide some suggested responses to various comments. Also, don't forget to update the National Council to the outcome of any visits or meetings about federal legislation.

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 or which staff you should follow up with. Sometimes legislators, regulators and funders agree to take specific actions but will forget if not prompted, so it's important to have the staff contact information.

"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 staff person to follow-up.

"Sounds interesting. I'd like to learn more."

Legislators, regulators and funders, especially those recently elected or appointed, 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 deciding. 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.

"I've always opposed federal funding for healthcare, mental health and addictions issues."

Be polite, but persistent. Let them know that while you disagree with them, you hope that the official 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 to follow up.