PHI
QUALITY CARE
THROUGH
QUALITY JOBS

A PRACTICAL RESOURCE GUIDE FOR DIRECT CARE WORKFORCE STATE ADVOCACY

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Introduction

States have long been fertile ground for advocacy on various important social issues, including the direct care workforce. Over the last two decades in particular, advocates and policymakers at the state level have proposed and enacted a range of innovative approaches for strengthening this critical workforce, tailoring these measures to their state's realities and modeling what policy progress can mean for these workers in other parts of the country.

However, as PHI's Direct Care Workforce State Index* illustrates[1], many states still have a long way to go. Recognizing the importance of building policy momentum across all states, PHI has created this resource guide for state-level advocates. We hope this guide helps them advance policies that enable direct care workers to thrive in their jobs and everyone to access the quality services and supports they need.

Direct Care Workforce State Index Rankings (2023)

● STATES RANKING 1-13 ● STATES RANKING 14-25 ● STATES RANKING 26-38 ● STATES RANKING 39-51
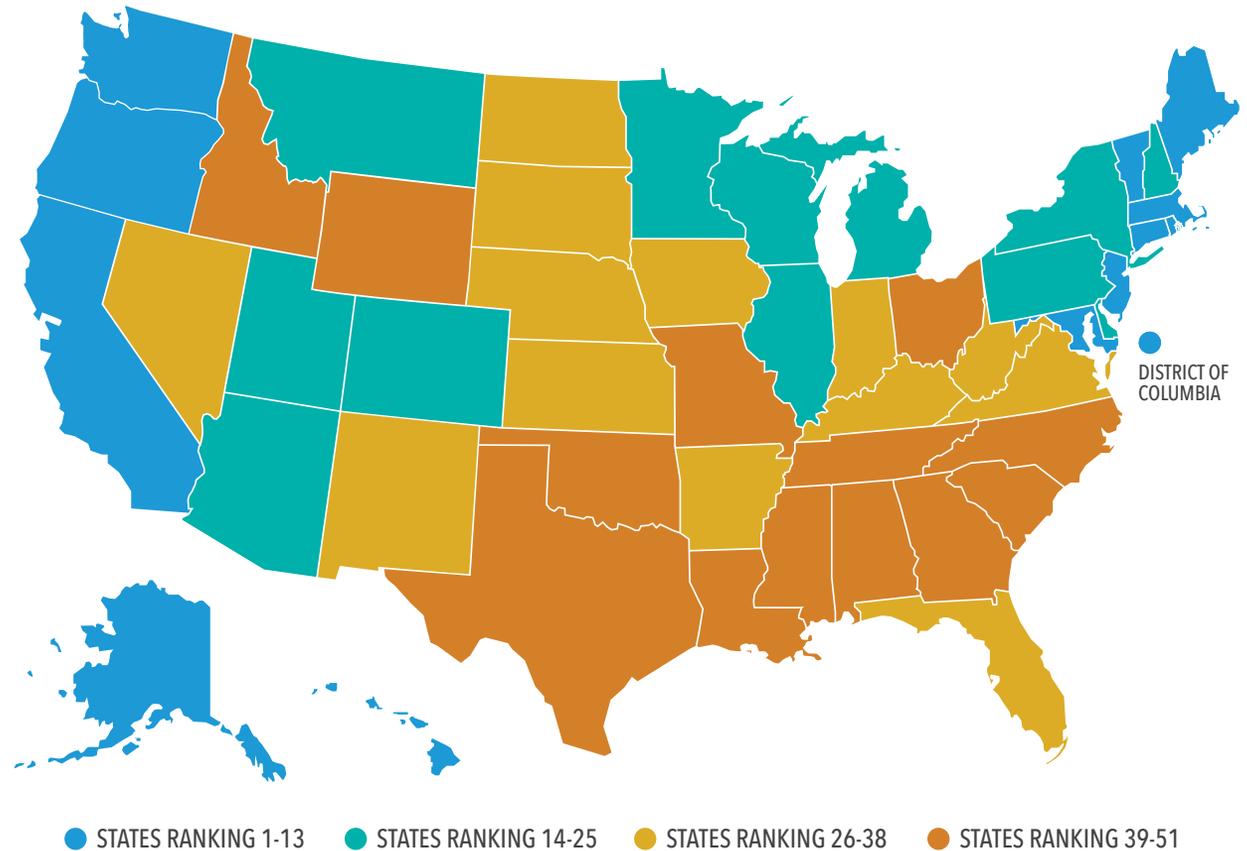
A History of PHI's State Advocacy Strategies

Since our founding in 1991, PHI has worked with numerous states to advance policy measures that improve direct care jobs and strengthen these workers' ability to deliver quality care to older adults and people with disabilities—a growing demographic with increasingly complex and diverse care needs.

In the 1990s, PHI designed training and support models for direct care workers primarily at our national headquarters in the Bronx and in partnership with Cooperative Home Care Associates, a home care cooperative that would grow to become the country's largest worker-owned cooperative. In that period, PHI also helped create home care cooperatives in Pennsylvania and Massachusetts while expanding employee-centered home care models in Detroit and New Hampshire.[2] All this work would help begin building the evidence base for policy change needed to transform these jobs.

PHI's state advocacy strategies expanded and evolved in the decade that followed. In 2002, with funding from the Centers for Medicare & Medicaid Services (CMS), PHI produced a series of publications to help state agencies (as well as service providers and individual consumers) recruit, train, and retain home care workers. Four years later, PHI worked with the CMS-established Direct Service Workforce Learning Collaborative and the National Direct Service Workforce Resource Center to develop various online resources and provide technical assistance to state leaders to help them strengthen this workforce. In 2010, PHI played a lead role in designing the federally sponsored Personal and Home Care Aide State Training Demonstration Program (PHCAST), which supported six states in developing or adapting and scaling competency-based personal care aide training programs. PHI also provided technical assistance to

PHCAST initiatives in four of the six states: California, Massachusetts, Michigan, and North Carolina.

In the years since, PHI has led advocacy initiatives and produced policy research in more than two dozen states. However, as the momentum on direct care workforce issues has expanded in recent years, it became clear that our state advocacy model needed to evolve to reach more advocates and policymakers who are moving the needle in their states. PHI's unique contribution to the sector has always been to help craft and advance policies informed by our 360-degree perspective on the long-term care field and draw upon our research, policy analysis, and practice-based experience in the field. Recognizing this approach and the importance of state-level policy change, in 2020, we launched a new approach to our state advocacy: the Essential Jobs, Essential Care™ multi-state advocacy initiative.

PHI's Essential Jobs, Essential Care Advocacy Initiative

Building on a growing number of states supporting this critical yet undervalued workforce, in January 2020, PHI and our coalition partners in three states launched a multi-year advocacy initiative to improve jobs for direct care workers at the state level. PHI's Essential Jobs, Essential Care multi-state advocacy initiative focuses on advancing policy solutions for direct care workers in three areas: increasing wages and reimbursement rates, promoting workforce innovations, and improving data collection.

The initial cohort of coalition partners included IMPART Alliance (Michigan), the New Mexico Caregivers Coalition, and the North Carolina Coalition on Aging.

From 2020 through 2022, PHI and these three coalition partners virtually convened hundreds of advocates across their states, raising awareness of direct care workforce issues, strengthening relationships and networks, building momentum for action, and generating concrete advocacy priorities. In that period, we also worked closely with our coalition partners to lead hundreds of advocacy activities, including hosting meetings, developing policy proposals, educating policymakers and the public, building relationships with decision-makers, and more.

This collective work has contributed to numerous policy wins, including (among others):

- **A permanent wage increase for direct care workers and seed funding** for a statewide direct care training infrastructure in Michigan;
- **A reimbursement rate increase for home and community-based services (HCBS) providers** with a wage-pass through for direct care workers in New Mexico; and
- **Wage increases and bonuses for direct workers in North Carolina**, as well as the creation of a Direct Care Jobs Innovation Fund to support recruitment and retention strategies in the state.[3]

Since our work began with the original three coalition partners, PHI's Essential Jobs, Essential Care model has evolved and grown. Maine, New Jersey, and New York have joined this initiative, and other states and multi-state projects are in development.

About This Resource Guide

This state advocacy resource guide offers concrete strategies, steps, and key resources learned from PHI's Essential Jobs, Essential Care initiative, as well as our decades of experience working at the state level with advocates, policymakers, workers, consumers, employers, and other stakeholders to strengthen the direct care workforce. It also includes ideas derived from other published resources and state advocacy experts—with quick links to those resources online.

This resource guide is comprised of 20 action-oriented strategies to help coalitions, organizations, and individuals advocate for the direct care workforce.

The 20 strategies are organized across five dimensions of advocacy: strategizing, designing, persuading, advocating, and evaluating. Each strategy includes specific and succinct steps, three key resources on the strategy's topic, and hyperlinks to these online resources. (See Appendix 1 for a complete list of state advocacy resources mentioned in this guide.) You may choose to read the entire guide from start to finish, learning about each strategy in sequence, or access individual strategies based on your advocacy needs and interests.

Click on this icon to jump back to the Table of Contents.

Click on this icon to jump to the complete list of advocacy resources in this guide.

DESIGN

Effective state advocacy campaigns are rooted in detailed strategies with clearly articulated policy goals. They employ a broad range of tactics that engage multiple stakeholders as champions who are prepared to persuade policymakers to make these goals a reality. A first step in creating such a campaign is to understand a state's policy environment on a specific direct care workforce issue or set of issues, which will help craft a detailed advocacy roadmap. Additionally, incorporating an equity lens into this roadmap will inform advocacy goals, create leadership opportunities in advocacy for marginalized communities, and tackle the many systemic inequities that continue to harm their lives.

STRATEGY

1

Understanding the Elements of Advocacy

Advocacy strategy benefits greatly from two dimensions: a theory of change that clearly describes how an organization or coalition believes policy change transpires and how its advocacy strategies will advance this change; and a logic model that names all the elements of a successful advocacy campaign or program.

3 USEFUL STEPS

1. Identify a theory of change.

A theory of change is essential for designing a smart state advocacy strategy. For example, your theory of change might show that building grassroots power is the most effective way to advance policy. Or it might posit that policy change occurs when advocates shift the cultural frames and messages that define the policy discourse. Defining your theory of change—whatever form it takes—will help create, substantiate, and communicate your state advocacy strategies.

2. Produce a logic model.

A logic model will help you understand how your advocacy strategy is supposed to work—and then plan accordingly.

Guided by your theory of change and available resources, your logic model will outline your planned advocacy activities, expected outputs, and short- and medium-term outcomes. All these elements are in service of your impact, which is the vision your advocacy will achieve in the long term if you're successful. (See the diagram below for a visualization of this logic model approach.)

3. Solicit input on your strategies.

Once you've developed both documents, begin sharing them with different stakeholders at all levels in your coalition. Explain these strategic concepts carefully to avoid confusion. As your thinking evolves with each conversation, so should your two strategy documents.

KEY RESOURCES

↗ Download *A User's Guide to Advocacy Evaluation Planning* for a comprehensive overview of advocacy planning and evaluation.

↗ Read the Center for Evaluation Innovation's *10 Theories to Inform Advocacy and Policy Change Efforts.*

↗ Learn from Purposeful's theory of change visual and narrative.

Click on each resource above to access it online.

RESOURCES/ INPUTS	ACTIVITIES	OUTPUTS	OUTCOMES	IMPACT
Certain resources are needed to operate your program.	If you have access to them, then you can use them to accomplish your planned activities.	If you accomplish your planned activities, then you will hopefully deliver the amount of product and/or service that you intended.	If you accomplish your planned activities to the extent you intended, then your participants will benefit in certain ways.	If these benefits to participants are achieved, then certain changes in organizations, communities, or systems might be expected to occur.

⬤ YOUR PLANNED WORK   ⬤ YOUR INTENDED RESULTS

Diagram: Adapted from "A Simple Logic Model," W. K. Kellogg Foundation, 2004[4]

STRATEGY

2

Conducting an Environmental Scan

An environmental scan helps advocacy leaders understand the various policy-related developments that have transpired over the years related to your policy issues. As part of our Essential Jobs, Essential Care initiative, PHI produced environmental scans for the first three states that helped our partner organizations in those states learn more about the policy landscape for their efforts.

3 USEFUL STEPS

1. Organize your environmental scan by issue area.

An environmental scan should be organized around the advocacy campaign's distinct policy issues or platform. For example, for the Essential Jobs, Essential Care initiative, we conducted environmental scans for each of the initiative's three issue areas: increasing direct care worker wages and reimbursement rates, improving direct care workforce data collection, and promoting direct care workforce innovations.

2. Focus your research.

To produce the landscape, use a combination of desk research and interviews with stakeholders to identify and describe recent policy developments within a specified time frame (i.e., the last five years), upcoming opportunities and challenges, and policy actors who have the power to advance your policy priorities.

3. Update the scan regularly.

Consider updating the environmental scan at least annually with new information, so that it can continue to inform your advocacy efforts as they evolve.

KEY RESOURCES

↗ **Produce a timeline capturing defining moments on key direct care workforce policy issues in your state, similar in format to this timeline from Accessibility.**

↗ **Learn from our 2017 landscape study on home care in Minnesota, which examined the state's workforce and trends in the broader sector.**

↗ **Read this journal article on a multi-faceted environmental scan for a federally funded vaccination project in Kentucky.**

Click on each resource above to access it online.

STRATEGY

3

Identifying Policy Priorities

Given the many challenges affecting direct care workers, there are numerous opportunities to strengthen and stabilize this workforce through public policy. The question is, where to start? Identifying and agreeing on policy priorities requires careful planning to ensure that the chosen priorities reflect what workers want and need, have been shown to be effective in other states or contexts, and resonate with the public and government officials, among others.

3 USEFUL STEPS

1. Understand worker challenges.

Reach out to workers and ask them to share their challenges on the job, why they're leaving or staying in these roles, and what they want lawmakers to address. Depending on what you want to know and the resources you're able to allocate to this step, consider conducting a survey, focus groups, and/or individual interviews. Remember that this sector is made up of multiple important actors, so be sure to also reach out to employers, older adults, people with disabilities, and family members, at a minimum, to collect their thoughts.

2. Translate ideas into actionable recommendations.

The process step above will generate several ideas for improving this job sector, but they won't necessarily identify the precise policy recommendations that state policymakers can adopt.

Fortunately, PHI and other experts have produced resources with concrete ideas for how states can address this workforce, including PHI's *5 Pillars of Direct Care Job Quality*, our state policy strategies guide from 2022[5], and our Direct Care Workforce State Index.[6]

3. Prioritize the recommendations.

Once you've compiled an extensive list of policy recommendations, it's time to prioritize—accounting for factors such as urgency, ability to move quickly, potential impact, and other factors. In terms of process, consider facilitating an in-person or virtual conversation in which stakeholders discuss and then vote on their top three priorities with final decisions entrusted to the steering committee, if you have one (see Strategy 9: Putting Together a Steering Committee).

KEY RESOURCES

➚ **See where your state ranks in PHI's Direct Care Workforce State Index and learn how other states are advancing this issue.**

➚ **Read through a diverse slate of 24 state-level policy ideas on the direct care workforce that PHI compiled in 2022.**

➚ **Watch a webinar with state and national experts discussing how states can strengthen the direct care workforce.**

Click on each resource above to access it online.

STRATEGY

4

Creating an Advocacy Road Map

An advocacy roadmap is a living document that translates the strategies outlined in your theory of change and activities detailed in your logic model into more granular information. As part of our Essential Jobs, Essential Care initiative, we developed an advocacy roadmap template for the three initial states in this effort (see Appendix 2: Key Elements of an Advocacy Roadmap).

3 USEFUL STEPS

1. Set goals and objectives.

Start by distilling your agreed policy priorities into succinct goals and objectives. For example, if your overall priority is to increase compensation, your specific advocacy goal could be to secure a permanent Medicaid rate increase with a direct care worker wage pass-through requirement. Objectives to achieve this goal within a specific timeframe could include introducing a bill in the next legislative session, generating a specific level of support from key state leaders, and/or enacting the law. If your advocacy program or campaign has more than one goal, create a separate section of the roadmap that details objectives for each goal.

2. Detail the activities.

The next step is to fill in detailed activities for each goal. For each activity, consider naming the lead person/group, target audience, indicator(s) of success, schedule/timeframe, and resources needed.

3. Solicit regular input and update the roadmap.

Arriving at a practical roadmap requires a process that maximizes input and collaboration while negotiating differences within a diverse group. The roadmap will also benefit from an assigned leader who can manage the roadmap document and coordinate a semi-regular process for updating it to reflect new developments and evolving priorities.

KEY RESOURCES

↗ Join the Advocacy Institute to access several online advocacy tools, including data about state and local officials, and more.

↗ Create, manage, and monitor your advocacy plan through a subscription-based online tool such as VoterVoice.

↗ Submit an online question to Bolder Advocacy to understand whether your advocacy meets lobbying laws and regulations.

Click on each resource above to access it online.

STRATEGY

5

Integrating a Racial and Gender Equity Advocacy Lens

A racial and gender equity lens on your advocacy will ensure that your policy priorities and advocacy strategies (and the structure of your organization or coalition) explicitly target the policy barriers that have harmed people of color, women, and immigrants for centuries.

3 USEFUL STEPS

1. Follow an intentional, step-by-step approach to building equity into your advocacy.

If your organization or coalition doesn't have adequate expertise in racial, economic, and gender equity, hire an expert who can help you incorporate this lens into your internal operations, programs, and advocacy.

2. Set racial and gender equity process indicators and advocacy outcomes.

For example, racial and gender equity process indicators could include diversifying the racial, ethnic, and gendered composition of a coalition's leadership and membership, and building the knowledge base of coalition members regarding racial and gender disparities in direct care. Advocacy outcomes with a racial and gender equity lens could include the enactment of policies related to supporting immigrants in direct care[7] or creation of mentorship programs in long-term care for people of color.[8]

3. Work closely with people of color, women, and immigrants (among others) and the organizations they respect to help lead this initiative.

A multi-racial, equitable coalition will embody the workers and communities your coalition represents and help unify constituents to strengthen it..

KEY RESOURCES

↗ **View Race Forward's 8-part video series on systemic racism to understand how it pervades our country's institutions.**

↗ **Learn from a video panel of experts as they discuss racial justice in public policy—and download the discussion guide.**

↗ **Use this tool to discern how communities of color would be affected by the policies you're proposing.**

Click on each resource above to access it online.

WHY IS RACIAL AND GENDER EQUITY IMPORTANT FOR DIRECT CARE WORKERS?

Systemic racism has long harmed people of color in direct care—from the creation of these poor-quality jobs, through the decades-long exclusion of home care workers (and other domestic workers) from federal wage and overtime protections, to the widespread hostility and racial discrimination that people of color and immigrants continue to face regarding employment, housing, education, and health care, among others. Additionally, caregiving has historically been defined as "women's work" and is often dismissed as a labor of love that requires only minimal compensation and support, perpetuating poor job quality in this sector.

Despite these numerous challenges, policy and practice interventions do not often account for the unique structural barriers and inequalities that direct care workers face on the job and in their daily lives. By centering women, people of color, and immigrants in their efforts, advocates can drive changes that ensure good jobs rooted in equity and justice.

ORGANIZE

Strong and diverse coalitions are more likely to achieve policy wins than individuals or single organizations. Such coalitions bring together stakeholders of various types and approach this work collaboratively, sorting through differences to reach agreement. Ultimately, coalitions build collective power to achieve policy wins that improve the overall well-being of their constituents—in this case, direct care workers.

STRATEGY

6

Developing a Stakeholder Ecomap

In the social services field, the ecomap has been used to visualize the key people and resources in an individual's life and identify additional services and supports that individual may need. Yet ecomaps can also support the advocacy process—helping advocates better envision the types of stakeholders they must engage to advance their policy goals. As part of our Essential Jobs, Essential Care initiative, PHI developed an online ecomapping tool for our state coalition partners that allowed them to input detailed information on stakeholders within and outside their coalitions, helping them depict which types of stakeholders were underrepresented.

3 USEFUL STEPS

1. List and categorize the organizations and key individuals who support your issue—and those who might oppose it.

In the direct care workforce context, you might consider including stakeholders from these categories: advocacy organizations, coalitions, and individuals; employers across settings; workforce development providers and training entities; direct care workers; older adults; people with disabilities; payers; policymakers, foundations and philanthropic groups; and opponents. (See Appendix 3 for a more detailed list of possible stakeholders to include in this ecomap.) Your ecomap might also denote each stakeholder's level of engagement and supportiveness.

2. Find out which types of stakeholders are missing from your coalition.

Once you have mapped out existing supporters, identify who is missing. For example, do you have enough organizations representing people with disabilities? Assisted living and other residential care employers? Stakeholders representing specific parts of the state? Who else needs to be part of your coalition?

3. Reach out to potential supporters and champions and update your ecomap regularly.

Through desk research and current contacts, locate the right person to contact at these organizations. Before reaching out to these groups, write a script that speaks to their potential interests and clearly describes your advocacy goals. Aim to update your ecomap regularly to ensure that it accurately reflects your stakeholder network.

KEY RESOURCES

↗ **Read our 2020 report to learn about the various stakeholders that comprise long-term care, including employers, payers, unions, and more.**

↗ **Familiarize yourself with the many dimensions of long-term care through sources like the National Institute on Aging.**

↗ **View this University of Pennsylvania virtual seminar on the "policy and politics" of long-term care.**

Click on each resource above to access it online.

STRATEGY

7

Building an Effective Coalition

Advocacy-based coalitions can help build solidarity across communities and constituencies, create networks that can be leveraged for multiple campaigns, and enable widespread impact on issues, among others benefits. However, building an effective coalition is not easy. In March 2022, we partnered with the Advocacy Institute, a New York-based organization that trains leaders on the elements of advocacy, to lead a webinar on this topic for the members of our Essential Jobs, Essential Care initiative. The steps described below are derived from this webinar.

3 USEFUL STEPS

1. Start by posing the most critical questions.

Organizations should consider beginning the coalition-building process by posing various questions that will help pinpoint who is needed "at the table" and where they stand on the issues. For example: who is most impacted, and who is missing? How can we expand our reach? Who has the resources we need? What are our shared goals as a group? Where might we not align?

2. Define the collective goal.

It's critical to emphasize the importance of defining a collective goal for a coalition. Since each coalition member has their individual priorities, it is crucial to identify where alignment exists on a concrete goal that feels central to everyone's work—and where there may be misalignment. When selecting a goal, consider that a single policy issue might feel more manageable for a coalition, but a broader platform of issues might engage more groups and individuals.

3. Create transparent decision-making protocols.

Another critical dimension of coalition building is to agree on a decision-making process. This process will help create shared expectations, openly address power dynamics, and define any "non-negotiables" (i.e., unacceptable behaviors and processes when making decisions)—among other dimensions.

KEY RESOURCES

➹ Watch a webinar training by the Advocacy Institute—in partnership with PHI—on how to convene and mobilize a strong coalition.

➹ Watch our webinar on how state coalitions and other state strategies are reshaping rural home care.

➹ Read the Prevention Institute's 8-step guide to developing effective coalitions.

Click on each resource above to access it online.

STRATEGY

8

Hosting a Statewide Convening

As you grow your coalition, there will come a time when you must bring everyone together to meet and solidify your advocacy efforts. To maximize accessibility, attendance, and engagement, a hybrid approach that allows for in-person and virtual attendance might be best. The guidance in this strategy draws from PHI's experience in early 2021, when we launched our Essential Jobs, Essential Care initiative with our three state coalition partners through three statewide convenings. These convenings were fully virtual due to the COVID-19 pandemic.

3 USEFUL STEPS

### 1. Define the aims and outcomes — then craft the agenda.

The aims of the first statewide convenings under the Essential Jobs, Essential Care initiative were to introduce new and existing participants to the initiative, educate them on the key issues facing this workforce, and agree on policy priorities for the next two years. Our expected outcomes were enhanced relationships and increased alignment on pressing policy issues for this workforce, among others. Our agenda matched these aims and outcomes.

2. Center direct care workers in the agenda of the convening.

Be sure to include direct care workers in the planning process of the meeting. As two examples, designate a portion of the agenda to a panel discussion with workers and create conditions that allow them to participate fully in the prioritization exercise and subsequent meetings.

3. Pay close attention to every detail of the convening.

For these gatherings, individuals were assigned different roles, including meeting facilitation, managing technical support questions, and leading critical sections of the meeting. The facilitators played music at key moments to create a friendly vibe, mixed virtual exercises into the structured conversations and presentations to keep the discussions lively, and facilitated large and small group discussions to arrive at group decisions. The goal was to ensure that a content-rich meeting with multiple participants would remain engaging.

KEY RESOURCES

➤ Watch our virtual event on New Jersey's direct care workforce.

➤ Scroll through Cvent's extensive guidance for hosting virtual events.

➤ Follow the *Stanford Social Innovation Review's* guidance for running effective hybrid meetings.

Click on each resource above to access it online.

STRATEGY

9

Putting Together a Steering Committee

An engaged steering committee will help guide your advocacy process on a regular basis and during moments of urgent action. A steering committee ensures that decisions at all levels are made efficiently with proper input, working closely with other leaders to drive the advocacy activities that the coalition has devised.

3 USEFUL STEPS

1. Create a clear committee structure.

Define the purpose and responsibilities of the steering committee then craft a job description that outlines expectations for each committee member. Central to a successful steering committee is a clear governance structure. What decisions will the committee oversee, and how will it arrive at them? Are members appointed or elected, and for how long? Be sure to address these and other questions by clearly outlining the committee's structure, policies, and protocols in tandem with different dimensions of the advocacy organization or coalition's structure.

2. Find the right size for the committee.

Committee members should represent different stakeholders in long-term care (e.g., workers, consumers, employers, and more) as well as communities that have been historically underrepresented in leadership roles. However, consider keeping the committee to about 10-12 people, or you might spend more time managing multiple people's schedules and participation than advancing your advocacy priorities.

3. Provide extrinsic rewards.

While committee members will be motivated by their commitment to the cause, you want to find and keep the ones who will go the extra mile—and that often requires tangible benefits. Consider offering committee members honorariums, media spokesperson opportunities, enhanced visibility at public events and on digital media platforms, and other rewards that tap into their personal needs and interests.

KEY RESOURCES

↗ **See how the National Safe and Healthy Housing Coalition Steering Committee has defined various roles and processes.**

↗ **Read what this article from the American Bar Association says are the factors critical to committee success.**

↗ **Run a successful steering committee meeting by following these tips from *Harvard Business Review*.**

Click on each resource above to access it online.

PERSUADE

Even though a growing number of people are struggling to access long-term care and feeling the effects of the direct care workforce crisis, advocacy coalitions must still persuade numerous audiences about the dire need for policy reform in this job sector. Successfully reaching these audiences requires effectively framing and messaging your issues, designing robust communications plans, and infusing your arguments with data and evidence.

STRATEGY

10

Framing and Messaging for Social Change

Successfully advancing policy reforms requires crafting messages that resonate with various audiences. In March 2022, PHI partnered with FrameWorks Institute, a nonprofit research organization that uses rigorous social science methods to study how people understand social issues, to lead a webinar on how to frame care work for people involved with our Essential Jobs, Essential Care initiative. The steps described below are derived from this webinar.

3 USEFUL STEPS

1. Envision the ideal.

Take a moment to think about the headline you would like to see in 10 to 15 years about care work if your advocacy succeeded. This exercise is important because it asks advocates to first imagine the endpoint and then work backward—piecing together the strategic frames and messages that will move various audiences toward that goal.

2. Understand the cultural mindsets behind care work.

Mindsets are "deep, assumed patterns of thinking that shape how we understand the world and how we make decisions." Mindsets are also widely shared, often embedded in our culture, durable, and rarely disappear. As direct care workforce advocates, spend time thinking about how embedded mindsets are shaping how people understand and support direct care workforce issues.

3. Craft messages that acknowledge the public doesn't fully understand 'care work.'

According to initial research by FrameWorks Institute, the most common mindsets about care work include: care workers are health care workers (i.e., doctors, nurses, etc.); care work occurs in institutions such as hospitals and nursing homes; care work that takes place in homes is less skilled and valued; and care work is tied to a person's character and not a skilled occupation. These mindsets are nuanced and not always accurate, yet what's important is that your messages should be tailored to your audiences' understanding about direct care workers, dispelling inaccuracies and misunderstandings along the way.

KEY RESOURCES

↗ Watch a webinar training by FrameWorks Institute—in partnership with PHI—on communicating the value of care work.

↗ Read FrameWorks Institute's report on the primary features of narratives for social change efforts.

↗ Download a resource guide for crafting a social change narrative project that can be applied to direct care workforce advocacy.

Click on each resource above to access it online.

STRATEGY

11

Designing a Strategic Communications Campaign

Successful advocacy campaigns rely on communications plans with delineated goals, clear audience descriptions and typologies, strategic frames and messages, a broad range of marketing and public education tactics across print and digital platforms—and more.

3 USEFUL STEPS

1. Define your goals.

Your communications plan should be built on specific, achievable short-term and long-term goals. For instance, a short-term communications goal could be to generate at least five positive news articles about direct care workforce policy issues in the next 12 months. A long-term goal could be to increase government officials' awareness about these policy issues by 20 percent within five years. When creating communications goals, align them with the advocacy campaign's goals.

2. Describe your primary audiences and create frames and messages that resonate with their values, goals, aspirations, and needs.

For example, one of your core audiences might be government officials who are undecided on a wage increase policy for direct care workers because they are concerned it's too expensive. Here, a targeted message could reinforce the economic benefits of such a policy by pointing out the effects of increased consumer spending and reduced turnover, which is costly. If formal market research is financially out of reach for your campaign, rely on desk research and insights from people who represent these audience types.

3. Design a communications plan that targets these audiences as precisely as possible through various methods.

A communications plan should be developed from the onset of a campaign, and communications strategists should be integrated in the leadership team to inform all thinking. As part of this plan, develop a press strategy and compile a broad array of stories from workers, consumers, and employers to humanize the problem and serve as media spokespeople.

KEY RESOURCES

↗ **Access Spitfire's Smart Chart 4.0® to create an actionable and effective communications plan for free.**

↗ **Read an expert article on the "science and art" of strategic communicatios.**

↗ **Create a social media marketing strategy in nine easy steps with Hootsuite's guidance.**

Click on each resource above to access it online.

STRATEGY

12

Producing an Outreach Brochure

Outreach brochures will help you organize and grow a broad coalition of individuals and organizations. A good brochure can persuade a potential new advocate—as well as policymakers, journalists, employers, and others—to believe in your cause through well-reasoned arguments and compelling stories. It clearly presents a problem, solution, and clear action step for them to take, whether by joining an electronic mailing list, attending an upcoming meeting, or another activity.

3 USEFUL STEPS

1. Design the brochure so it can be read quickly and skimmed if necessary.

Because most people have limited reading time, restrict your copy to what's essential and write in a vivid, conversational tone that's urgent and optimistic. Intersperse short blurbs of copy with images (such as worker photos and data graphics), snappy headlines and sub-headers, bulleted lists, and selective white space to keep the design airy and increase accessibility for visually impaired people.

2. Move the reader from problem to solution to action.

In other words: start by describing the problem, move toward the solution, explain why your advocacy efforts help advance that solution, and then offer at least one clear way to become involved.

3. Assume the reader is learning about this issue for the first time.

Avoid industry jargon, explain key concepts, and spell out acronyms on first reference. To test the brochure, ask a friend and someone from your intended audience(s) to read it and tell you where it made sense and what they took from it.

KEY RESOURCES

➤ Use Canva's online brochure maker, which includes hundreds of templates.

➤ Read through these top design trends for brochures to ensure your approach is practical and current.

➤ Download the state-specific outreach brochures that PHI created for our Essential Job, Essential Care initiative.

Click on each resource above to access it online.

STRATEGY

13

Making Research-Informed Advocacy Arguments

Research will help substantiate your policy arguments and assure policymakers that the proposal they're considering is rooted in strong evidence. Data can also be used in your broader communications efforts, persuading people to support your policy issue and building the personal and political will to bring about major policy change.

3 USEFUL STEPS

1. Scan the literature for published studies and conduct original research.

The foundation of a solid research-informed advocacy argument is sound research. Whether qualitative or quantitative, empirical research relies on a systematic methodology that produces valid and reliable results. If you find that the research to ground your policy idea doesn't exist, consider partnering with a trained researcher to design a study that produces original data for various purposes.

2. Report the research findings authentically and compellingly.

Work with a researcher to ensure your published findings are presented accurately and don't misrepresent any aspects. Likewise, engage a communications expert to help frame the findings for maximum public impact.

3. Disseminate the research findings creatively across print and digital materials.

For example, you can release your study as an original publication, or infuse specific data points into advocacy materials, website pages, social media posts, press releases, infographics, talking points, and fundraising materials. However, remember that many people are overloaded with information in today's digital age, so be sure to highlight the most important takeaways and create quality materials that stand out.
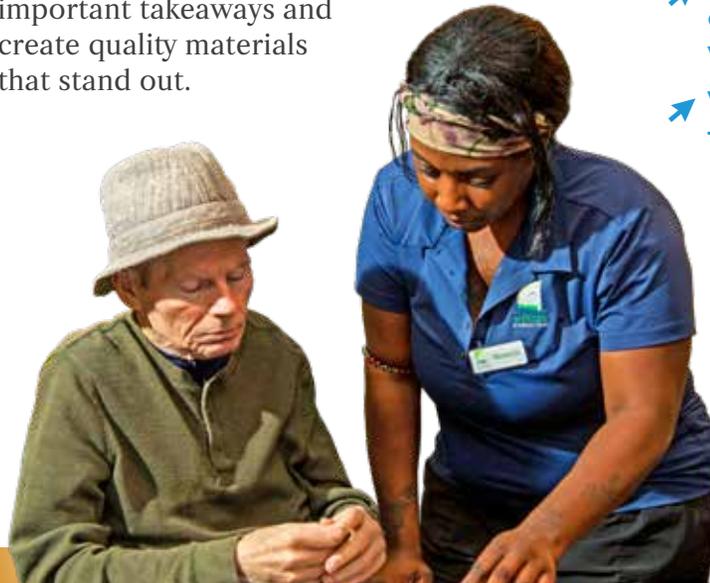
KEY RESOURCES

➤ Study PHI's 2021 federal policy priorities report to see how we use data to bolster policy arguments on this workforce.

➤ Use a web platform like Infogram to create infographics and other data visualizations.

➤ Visit PHI's Workforce Data Center for state-specific data on the direct care workforce.

Click on each resource above to access it online.

ADVOCATE

Critical to a successful advocacy initiative is offering concrete policy recommendations and cultivating relationships with a spectrum of stakeholders, including advocates, policymakers, industry leaders, and a grassroots base of individuals affected by the direct care workforce crisis. Additionally, engaging workers directly as advocates and experts while drawing from their stories to shape the political discourse on this issue will strengthen every aspect of your advocacy.

STRATEGY

14

Building Relationships with Diverse Stakeholders

Strong relationships are at the core of an effective advocacy campaign, especially when those relationships are with a broad and diverse constellation of stakeholders that represent different sectors, issues, and populations. In March 2022, PHI partnered with the Advocacy Institute—a New York-based organization that helps individuals and organizations build their advocacy skills—to lead a webinar on building effective relationships with diverse stakeholders, as part of our Essential Jobs, Essential Care initiative. The steps described below are derived from this webinar.

3 USEFUL STEPS

1. Conduct a power analysis.

State advocacy organizations should consider approaching relationship-building by first conducting a power analysis that assesses the full landscape of organizations, coalitions, faith leaders, unions, individuals, opposition groups, and other stakeholders in their states. As one approach, a power analysis can chart groups across four quadrants based on two axes: their "power" (however that is defined by your coalition) and the extent to which each group supports or opposes your efforts.

2. Identify and build relationships with these stakeholders, including primary and secondary targets.

Primary targets in advocacy are typically government officials who have the authority to enact or implement your recommendation(s). The secondary target (often "behind the scenes") has the influence and positional power to convince this primary target to act in your favor. Remember: a target should always be a person and not a group or institution.

3. Tap their personal motivations.

Identifying and responding to the individual interests, needs, and aspirations of your stakeholders is essential in relationship-building. You can learn more about their interests through individual conversations and group meetings with them and by reviewing their social media posts and websites, what they've published or stated in the press, the bills they've sponsored (if an elected official), and other sources.

⌨ KEY RESOURCES

↗ **Watch a webinar training by the Advocacy Institute—in partnership with PHI—on building the relationships you need to win.**

↗ **Use this tool from Community Catalyst to understand whether your coalition is sufficiently diverse and inclusive.**

↗ **Begin creating a more welcoming and equitable culture in your coalition through this Awake to Woke to Work™ resource.**

Click on each resource above to access it online.

STRATEGY

15

Engaging with State Policymakers

Successful state advocacy requires fully understanding what state policymakers oversee, their level of authority, and what drives their daily work. For example, elected officials and their staff recognize they must appeal to different constituencies for accountability and votes. Therefore, they will want to introduce and pass measures that align with their policy platforms, help fulfill what they have promised, and address critical issues in the public eye. On the other hand, appointed or hired government officials might be more attuned to the mission and purview of their roles, departments, and agencies.

3 USEFUL STEPS

1. Speak to policymakers' individual values, interests, and information needs.

You should know when to work closely with someone on your side, when to persuade someone who is undecided or who only partially agrees with your agenda, and when to work around or confront your opposition proactively. Policymakers often have precise questions, and you should address them directly. Your relationship with them will be stronger if they view you as a trustworthy source who can answer their questions honestly and efficiently.

2. Schedule direct contact with state policymakers, whether virtual or in person.

When introducing your coalition to a state policymaker, succinctly describe the problems you're addressing and why they impact workers, consumers, and the economy—with a tailored rationale to the official's purview or constituency. Once you've shared your priorities with them, ask them for their reactions and the best way to remain in touch. Afterward, cultivate these relationships by contacting them regularly, inviting them to meet with other members of your coalition, offering them speaking opportunities at your events, and creating more intensive partnerships with officials who could advance your policy priorities.

3. Understand 501(c)(3) parameters and consider launching a 501(c)(4).

If you're a nonprofit organization with 501(c)(3) tax status, you'll be limited in—but not prohibited from—engaging in certain types of advocacy activities. You might decide to take your advocacy to another level by creating a 501(c)(4), which will expand your relationships with elected officials and the electoral process. Also, if an individual organization within a coalition takes he lead in forming a 501(c)(4), be sure to create clear policies, protocols, and operating agreements for these types of decisions to minimize conflict in the future.

KEY RESOURCES

↗ **Learn how to build and maintain relationships with your state's Governor's office, departments, agencies, press staff, and legislators.**

↗ **Follow the ACLU of Wisconsin's eight steps for engaging elected officials.**

↗ **See what it takes to start a 501(c)(4) organization.**

Click on each resource above to access it online.

STRATEGY

16

Centering Workers as Experts

Despite their extensive wisdom on care delivery and job quality, direct care workers are rarely tapped for their expertise when it comes to designing advocacy strategies or crafting public policies. Moreover, direct care workers make ideal spokespeople with government audiences, the media, and other advocates. The insights in this strategy draw from our Direct Care Worker Story Project, where we work closely with workers nationwide to share their stories and ideas in their own words.

3 USEFUL STEPS

1. Build internal support.

Ensure that everyone in your coalition understands the true nature of direct care jobs and these workers' unique value in the advocacy process. Because direct care workers bring invaluable expertise in devising advocacy strategies, be sure to explain why direct care workers are profound experts and that their unique experiences and stories will help substantiate the need for reform in this job sector.

2. Accommodate workers' needs.

It is important to accommodate direct care workers' schedules and needs to ensure they can participate fully in your advocacy campaign. For example, you might need to schedule meetings at different times to accommodate workers' schedules. Workers will need compensation for their time and support, whether through an honorarium that compensates for their time spent engaging in advocacy, tech support

for taking part in virtual meetings, and transportation and/or childcare assistance to enable them to join in-person gatherings— among other supports.

3. Demystify 'advocacy' and avoid jargon.

Because workers (like most people) might not be familiar with advocacy concepts or jargon, clearly explain each step of the advocacy process in culturally and linguistically competent ways. For example, you could create one-page summaries, presentations, brief training sessions, and other materials that explain how their participation in a current policy campaign will eventually lead to a policy win. These resources should be translated for people who speak different languages in your community and tailored for those with varying literacy levels. They should understand which policymakers or government bodies will make each decision at every step, the procedures and time frame for your state's legislative or regulatory process, and what's at stake for them and other people affected by the issue.

KEY RESOURCES

↗ Check out the various narrative and photo stories from PHI's Direct Care Worker Story Project.

↗ See how PHI worked with *Next Avenue* to feature the experiences and ideas of direct care workers in their reporting.

↗ Read how Maine's Long-Term Care Ombudsman Program has created a direct care worker advisory council to inform state policy.

Click on each resource above to access it online.

STRATEGY

17

Submitting Formal Policy Guidance

The policymaking process offers numerous opportunities for advocates to submit their thoughts and recommendations in writing. For example, governments often open policy proposals to public comment, inviting stakeholders and the public to submit formal reactions before solidifying these measures. An effective policy letter or memo will help policymakers understand the many facets of a problem, how their policy proposals address those dimensions, and where they could improve.

3 USEFUL STEPS

1. Position yourself as an expert in the issue at hand.

When submitting written materials, provide a concise description of your organization or coalition, including its purpose, unique expertise, who it represents, and what it has achieved (i.e., outcomes not activities)—over time and recently—on the policy issue under consideration. Policymakers typically gravitate toward advocates who represent broad segments of the community and who hold reputations that resonate positively with various stakeholders.

2. Offer clear and substantiated recommendations.

Each recommendation should be clearly stated and supported by evidence and a proper citation if available. If you are commenting on a particular policy proposal, reference the relevant language from the proposal, and be sure to show how your recommendation will improve both the policy proposal and the societal problem it's addressing. Wherever possible, avoid jargon, fluff language, unnecessary details, acronyms without full names, and exaggerated claims.

3. When responding to a call for comments, follow the instructions.

This advice might seem obvious, but you don't want a policymaker disregarding your guidance because you didn't follow clear instructions. Pay careful attention to the: required word, character, or page length (and keep the font size legible); submission deadline; recipient's name, title, and address; and submission method for your guidance (e.g., via email, an online form, etc.). The subject header of the email, letter, or memo should cite the specific policy title or issue area you're addressing. The tone should be formal but friendly, and the content should be straightforward.

KEY RESOURCES

→ Read through the policy guidance submitted by the Leadership Council on Aging Organizations on health, community services, and income security.

→ Review PHI's official testimony for a Congressional hearing hosted by the U.S. Committee on Education and Labor in July 2021.

→ Follow the guidance on how to write a policy memo from Boston University's School of Public Health.

Click on each resource above to access it online.

STRATEGY

18

Telling Stories to Advance an Issue

While evidence-based arguments can persuade certain policymakers or members of the public to support your issues, others will be convinced by stories rooted in commonly held values. Compelling storytelling is a craft that requires careful attention to crucial elements, as well as champions who are willing to share their lives and experiences with a broader audience.

3 USEFUL STEPS

1. Engage workers to tell their stories in their own words.

As part of PHI's Direct Care Worker Story Project, we interview workers about their jobs, daily experiences, and ideas for reforming this job sector, then publish these stories entirely through long-form quotes with professional photography. This approach preserves their original voices and helps people appreciate their complex realities.

2. Describe the systemic context of workers' stories.

A good worker story will humanize the issues and policy solution you're proposing. Your audiences should understand how the problems faced by direct care workers are not about that individual, but rather rooted in systems and structures that need to be reformed.

3. Work with journalists to cover direct care workforce issues.

Reporters interested in covering this topic will want to speak directly with workers (and other individuals affected by the workforce crisis) to personify this topic. To capitalize on this opportunity, gather a group of workers and other affected parties who are prepped to speak with reporters on-message, and create a strategy that generates positive news articles, publishes op-eds, and gradually shifts the media narrative on this workforce (see Strategy 11).

KEY RESOURCES

↗ Check out the worker stories from PHI's Direct Care Worker Story Project.

↗ Access the many online tools at Storytelling for Good, a project of the Communications Network.

↗ Scroll through a slideshow of *Pixar's 22 Rules to Phenomenal Storytelling.*

Click on each resource above to access it online.

SUSTAIN

Because policy wins often take years to achieve, it's essential to ensure that your efforts are sustainable in the long term. Two critical dimensions of sustainability are evaluation, which will help you understand and communicate your process and impact, and fundraising, which will help you generate funding support from multiple sources.

STRATEGY

19

Evaluating Advocacy

It is important to evaluate your advocacy program or campaign in order to assess success and make adjustments along the way as needed. Designing an evaluation plan to measure advocacy-related progress and outcomes takes time and effort, but it is feasible. The evaluation field has become more accessible and user-friendly in recent years, providing advocates with practical tools to help them succeed in this regard.

3 USEFUL STEPS

1. Integrate evaluation into your advocacy planning.

Evaluation should be integrated early in the process of designing an advocacy program or campaign (see "Strategize" section) to ensure that activities, outputs, and outcomes are aligned and measurable. If you are not able to work with an external program evaluator or researcher, draw on published tools to guide your evaluation efforts.

2. Draft an evaluation plan.

When designing an evaluation plan for your advocacy, consider following these steps. First, decide who will use the evaluation and how it will be used. For example, is the goal to help a public stakeholder understand what the advocacy achieved, and will they share those results publicly? Or is it aimed at another audience and for a different use? Next, develop the specific questions that the evaluation will answer. From here, create a theory of change and logic model (described in Strategy 1) to detail the various elements that will guide the evaluation.

3. Engage stakeholders to inform your evaluation plan.

Engaging your stakeholders in determining the evaluation questions, design, measurement tools, and other aspects of your approach is essential. This step is crucial for people who will help collect data, though it's also relevant to other individuals.

KEY RESOURCES

- Read the W.K. Kellogg Foundation's *The Step-by-Step Guide to Evaluation* to develop a comprehensive understanding of evaluation.

- Look through the Communications Network's guide for assistance with evaluating communications strategies.

- Integrate a participatory approach into your evaluation by following this guidance from Better Evaluation.

Click on each resource above to access it online.

EVALUATING PHI'S ESSENTIAL JOBS, ESSENTIAL CARE INITIATIVE

The evaluation plan for our Essential Jobs, Essential Care initiative in 2000-2022 was based on five key questions, which aimed to maximize the impact of this initiative and inform future state-based advocacy.[9]

1. Implementation. Were the activities of the initiative implemented as intended and on schedule in each state?

2. Outcomes. Did the initiative increase knowledge, supportiveness, engagement, and/or advocacy capacity related to direct care workforce policy issues and racial equity in each state?

3. Impact. Did the initiative contribute to measurable advancement in policy related to direct care worker compensation, workforce innovations, and/or data collection?

4. Context. What demographic, economic, cultural, organizational, political, or other factors might have influenced the initiative's implementation and outcomes?

5. Steps Learned. What were the main steps learned from this initiative?

STRATEGY

20

Fundraising for Advocacy

Effective fundraising supports any organization or coalition stay financially strong, achieve its goals, and grow its efforts. While this resource guide will help you design advocacy strategies that will generate support among many grantmakers and individuals, it's wise to employ multiple proactive fundraising strategies to be as solvent as possible.

3 USEFUL STEPS

1. Diversify your fundraising.

Organizations that rely on multiple funding sources will be more likely to weather inevitable financial disruptions and thrive in the long term. Consider garnering support from individual donors, major donors, corporate sources, public and private foundations, and government sources. These categories can also be broken down to further diversify your fundraising; individual donors, for example, may include prospects, new donors, and long-time donors.

2. Develop compelling fundraising-related messages, materials, and campaigns that reach distinct audiences.

For example, a national foundation focused on your state will likely require framing that both describes your state context and how it fits within the national landscape. Likewise, a new donor might need clear messages that relate their personal interests to your organization or coalition's efforts. And while it's fair to make assumptions about these audiences, you'll be more successful with fundraising if you've researched these audiences to understand what resonates. For each fundraising audience, craft a clear messaging framework describing how your advocacy will lead to policy change.

3. Create fundraising strategies that reach multiple funding sources as creatively as possible.

For example, to support foundation-related fundraising, Candid offers the Foundation Directory, a subscription-based service that helps nonprofit organizations identify grantmakers. While using this service, you will need to adjust your search terms to identify as many funders as possible, since your focus areas will likely be dispersed across the platform's search categories. As another example, explore a membership structure that allows individuals to support your advocacy, using a sliding scale to ensure membership fees do not become prevent participation for anyone.

KEY RESOURCES

↗ Peruse *Nonprofit Quarterly's Grassroots Fundraising Journal* for advice on raising money for social change.

↗ Consider Candid's Foundation Directory and other similar directories to access the latest information on U.S. foundations and their funding interests.

↗ Read Nonprofit Hub's blog article on how smart advocacy strategies can improve fundraising efforts.

Click on each resource above to access it online.

Complete List of Advocacy Resources in this Guide

DESIGN

▸ Download *A User's Guide to Advocacy Evaluation Planning* for a comprehensive overview of advocacy planning and evaluation.

▸ Read the Center for Evaluation Innovation's *10 Theories to Inform Advocacy and Policy Change Efforts.*

▸ Learn from Purposeful's theory of change visual and narrative.

▸ Produce a timeline capturing defining moments on key direct care policy issues in your state, similar in format to this timeline from Accessibility.

▸ Learn from our 2017 landscape study on home care in Minnesota, which examined the state's workforce and trends in the broader sector.

▸ Read this journal article on a multi-faceted environmental scan for a federally funded vaccination project in Kentucky.

▸ See where your state ranks in PHI's Direct Care Workforce State Index and learn how other states are advancing this issue.

▸ Read through a diverse slate of 24 state-level policy ideas on the direct care workforce that PHI compiled in 2022.

▸ Watch a webinar with state and national experts discussing how states can strengthen the direct care workforce.

▸ Join the Advocacy Institute to access several online advocacy tools, including data about state and local officials, and more.

▸ Create, manage, and monitor your advocacy plan through a subscription-based online tool such as VoterVoice.

▸ Submit an online question to Bolder Advocacy to understand whether your advocacy meets lobbying laws and regulations.

▸ View Race Forward's 8-part video series on systemic racism to understand how it pervades our country's institutions.

▸ Learn from a video panel of experts as they discuss racial justice in public policy—and download the discussion guide.

▸ Use this tool to discern how communities of color would be affected by the policies you're proposing.

ORGANIZE

▸ Read our 2020 report to learn about the various stakeholders that comprise long-term care, including employers, payers, unions, and more.

▸ Familiarize yourself with the many dimensions of long-term care through sources like the National Institute on Aging.

▸ Watch this University of Pennsylvania virtual seminar on the "policy and politics" of long-term care.

▸ Watch a webinar training by the Advocacy Institute—in partnership with PHI—on how to convene and mobilize a strong coalition.

▸ Watch our webinar on how state coalitions and other state strategies are reshaping rural home care.

▸ Read the Prevention Institute's 8-step guide to developing effective coalitions.

▸ Watch our virtual event on New Jersey's direct care workforce.

▸ Scroll through Cvent's extensive guidance for hosting virtual events.

▸ Follow the *Stanford Social Innovation Review's* guidance for running effective hybrid meetings.

▸ See how the National Safe and Healthy Housing Coalition Steering Committee has defined various roles and processes.

▸ Read what this article from the American Bar Association says are the factors critical to committee success.

▸ Run a successful steering committee meeting by following these tips from *Harvard Business Review*.

PERSUADE

▸ Watch a webinar training by FrameWorks Institute—in partnership with PHI—on communicating the value of care work.

▸ Read FrameWorks Institute's report on the primary features of narratives for social change efforts.

▸ Download a resource guide for crafting a social change narrative project that can be applied to direct care workforce advocacy.

▸ Access Spitfire's Smart Chart 4.0® to create an actionable and effective communications plan for free.

▸ Read an expert article on the "science and art" of strategic communicatios.

▸ Create a social media marketing strategy in nine easy steps with Hootsuite's guidance.

▸ Use Canva's online brochure maker, which includes hundreds of templates that can be easily populated, branded, and sent to print.

▸ Read through the top design trends for brochures to ensure your approach is practical and current.

▸ Download the state-specific outreach brochures that PHI created for our Essential Job, Essential Care initiative.

▸ Study PHI's 2021 federal policy priorities report to see how we use data to bolster policy arguments on this workforce.

▸ Use a web platform like Infogram to create infographics and other data visualizations.

▸ Visit PHI's Workforce Data Center for state-specific data on the direct care workforce.

ADVOCATE

▸ Watch a webinar training by the Advocacy Institute—in partnership with PHI—on building the relationships you need to win.

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▸ See how PHI worked with *Next Avenue* to feature the experiences and ideas of direct care workers in their reporting.

▸ Read how Maine's Long-Term Care Ombudsman Program has created a direct care worker advisory council to inform state policy.

▸ Read through the policy guidance submitted by the Leadership Council on Aging Organizations on health, community services, and income security.

▸ Review PHI's official testimony for a Congressional hearing hosted by the U.S. Committee on Education and Labor in July 2021.

▸ Follow the guidance on how to write a policy memo from Boston University's School of Public Health.

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▸ Integrate a participatory approach into your evaluation by following this guidance from Better Evaluation.

▸ Peruse Nonprofit Quarterly's *Grassroots Fundraising Journal* for advice on raising money for social change.

▸ Consider Candid's Foundation Directory and other similar directories to access the latest information on U.S. foundations and their funding interests.

▸ Read Nonprofit Hub's blog article on how smart advocacy strategies can improve fundraising efforts.

Key Elements of the Advocacy Roadmap

ISSUE 1

Lifting workers out of poverty

One of the three issue areas around which the EJEC initiative has been built

ADVOCACY GOAL

Specific goal that will be achieved within the next two years

Medicaid rate increase for long-term services and supports with wage pass-through for direct care workers

OBJECTIVES

Specific objective that serves as a key milestone toward achieving this advocacy goal

Each goal may have a different number of specific objectives.

QUARTER	ACTIVITY	LEAD PERSON/ GROUP	TARGET AUDIENCE	INDICATOR(S) OF SUCCESS	SCHEDULE/ TIMEFRAME	RESOURCES NEEDED
The "Quarter" column allows for quick assessment of how activities are distributed across the two years of the Roadmap.	*"Activity" denotes each action that wil be needed to accomplish the specific objectives and advocacy goal.*	*"Lead Person/ Group" is the person or group responsible for leading the action. However, they are not expected to act alone.*	*"Target Audience" is the intended target of the action: a legislator, an agency, the media, the general public, etc.*	*"Indicator(s) of Success" refers to the tangible outcomes of an action: a meeting held, a report published, a bill drafted. There may be one or more indicators per action.*	*"Schedule/ Timeframe" details the intended deadline for the action.*	*"Resources Needed" includes everything that will be needed— people power, written documents, time and/ or space, etc.—to ensure the success of the given activity.*
Q1 (JAN – MAR)						
Q2 (APR – JUN)						
Q3 (JULY – SEPT)						
Q4 (OCT – DEC)						

Direct Care Workforce Advocacy Ecomap Categories

In direct care workforce advocacy, an ecomap can help identify organizations and individuals who are central to the success of your initiative—and where there are gaps in representation.

Below is a non-exhaustive listing of categories of stakeholders you should consider for your ecomap.

WORKERS, OLDER ADULTS, PEOPLE WITH DISABILITIES, FAMILY CAREGIVERS

ORGANIZATIONS, COALITIONS, AND INDIVIDUALS

- Aging
- Consumer
- Disability
- Faith-Based
- Family Caregiving
- Health

- Immigrant Rights
- Racial Equity & Justice
- Social Justice
- Unions
- Women's Rights / Gender Justice
- Workers' Rights

EMPLOYERS ACROSS SETTINGS

- Agencies
- Consumer-Directed Groups
- Trade Associations

WORKFORCE DEVELOPMENT PROVIDERS / TRAINING ENTITIES

- Community Colleges
- Community-Based Organizations

GOVERNMENT

- Elected Officials
- Department and Agency Staff
- Key Committees and Caucuses

MANAGED CARE ORGANIZATIONS AND OTHER PRIVATE PAYERS

FOUNDATIONS AND OTHER PHILANTHROPIC GROUPS

OPPONENTS

Notes

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3. PHI. 2022. *Building the Direct Care Workforce Movement: The Essential Jobs, Essential Care Multi-State Initiative*. Bronx, NY: PHI. https://www.phinational.org/resource/building-the-direct-care-workforce-movement-the-essential-jobs-essential-care-multi-state-initiative/.

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8. American Society on Aging. "ASA Rise." Accessed January 3, 2023. https://www.asaging.org/asa-rise.

9. PHI. 2022. *Building the Direct Care Workforce Movement: The Essential Jobs, Essential Care Multi-State Initiative*.

PHI

QUALITY CARE THROUGH QUALITY JOBS

PHI is a national organization committed to strengthening the direct care workforce by producing robust research and analysis, leading federal and state advocacy initiatives, and designing groundbreaking workforce interventions and models. For 30 years, we have brought a 360-degree perspective on the long-term care sector to our evidence-informed strategies. As the nation's leading authority on the direct care workforce, PHI promotes quality direct care jobs as the foundation for quality care.

PHInational.org

- Learn about our research, advocacy, workforce innovations, and public education

- Scroll through our library of studies, policy reports, and multimedia resources

- Visit the National Direct Care Workforce Resource Center and the Direct Care Workforce State Index

- Download national and state-by-state data on the direct care workforce

- Meet the workers in the National Direct Care Worker Story Project

- Bookmark our newsroom for the latest news and opinion: PHInational.org/news/

- Subscribe to our monthly newsletter: PHInational.org/sign-up/

- Read about the latest federal and state policy developments for direct care workers