

COMMUNITY ADVOCACY:

A PSYCHOLOGIST'S TOOLKIT FOR
STATE AND LOCAL ADVOCACY



Developed by Toolkit Taskforce Members:*

**Authors listed in alphabetical order*

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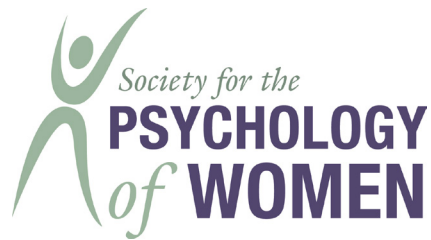
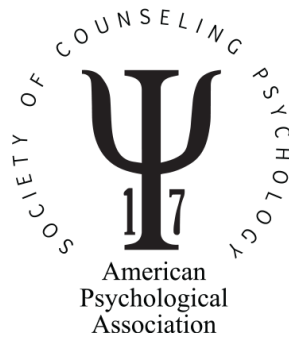
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COMMISSION

Commissioned by 2017 American Psychological Association (APA)
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- Division 17 Society of Counseling Psychology (Arpana G. Inman, President, 2018)
- Division 27 Society for Community Research and Action (Yolanda Suarez-Balcazar, President, 2018)
- Division 35 Society for the Psychology of Women (Margaret L. Signorella, President, 2018)
- Division 45 Society for the Psychological Study of Culture, Ethnicity and Race (Helen Neville, President, 2018)



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PREFACE

This Advocacy Toolkit developed as a result of a joint effort between four divisions of the American Psychological Association (APA): Division 17, the Society of Counseling Psychology; Division 27, the Society for Community Research and Action; Division 35, the Society for the Psychology of Women; and Division 45, the Society for the Psychological Study of Culture, Ethnicity and Race. The goals were to develop a science-based, high-quality advocacy toolkit that highlights different forms of advocacy strategies to inform policy at the state and local levels and to build a community of grassroots psychologist advocates that can intervene to promote well-being in the communities in which they reside.

We understand that psychologists are coming to this document with a range of experiences and knowledge. Our hope is to provide a toolkit that facilitates the novice and adds to the knowledge base of those who are seasoned. The purpose of this document is to guide psychologists' efforts to influence decision-makers as well as governmental, institutional, and organizational policies.

We acknowledge other existing advocacy toolkits and would like our work to be seen in collaboration with this body of knowledge. We have learned from and built upon the foundation made by these toolkits and

see them as companions. Some focus solely on [federal advocacy](#)¹ for [psychologists](#)²; some highlight [human-rights based](#)³ approaches and the importance of [evaluation](#)⁴; others focus on [children](#)⁵; others, still, focus on [community](#)⁶ based advocacy. These and other tools are important resources for psychologists engaging in advocacy. This current toolkit is distinctive in its focus on psychologists' involvement in state and local advocacy and its coverage of advocacy across all branches (legislative, executive, judicial) of government.

Numerous examples of psychologists are included, along with hyperlinks to provide access to more in-depth information and "how to" guides. For those with a print version of this document, the web addresses (URLs) for the hyperlinks can be found in the Web Addresses for Hyperlinks section near the end of the toolkit.

BRIEF STATEMENT ON VALUES

Several values guided this document. We believe in broad participation, collaboration, and culturally responsive advocacy -- we take into consideration the particular needs and circumstances of the groups with whom we serve. Our stance is to work in partnership with communities rather than for or on behalf of them. We see psychologists engaging in advocacy as acting in the public interest and acting in alignment with APA's mission "to advance the creation, communication and application of psychological knowledge to benefit society and improve people's lives" (American Psychological Association [APA], 2019).

DEFINITIONS AND DISTINCTIONS

The image features a teal background with a large, dark blue, rounded rectangular shape in the center. Overlaid on this is a thick, orange line that forms a complex, stepped path. The path starts at the top left, moves right, then down, then right again, then down, then right, then down, then right, and finally down. The path is composed of several horizontal and vertical segments connected by rounded corners. The overall design is clean and modern.

DEFINITIONS AND DISTINCTIONS

Terms related to advocacy often go undefined. Or, perhaps they are so often used that we are hesitant to admit we are not certain about their meaning. In reality, some terms overlap or are used interchangeably when there are in fact distinctions. Shared language is an important first step in the process of advocacy, so we have attempted to define and make distinctions between some common terms.

There are several definitions of **advocacy**, which can be summarized as “action taken to support a particular outcome or cause” (Toporek, Kwan, & Williams, 2012, p. 306). More specifically, Toporek and Liu (2001) described advocacy as a continuum ranging from empowerment to social action depending on the target of advocacy. For example, advocacy focused on a specific individual may reflect individually focused interventions aimed toward client empowerment (e.g., in a clinical situation), and at the macro level advocacy aimed at larger systems may reflect social action. Empowerment could also take place at a group or community level, such as working with communities in capacity building. Specific to psychology, advocacy refers to promoting the application of psychological knowledge to inform policy (APA, 2014). When we think about “policy”, laws often come to mind. However, policy can also refer to

governmental rules and regulations as well as accepted practices and norms within an organization or institution.

At times, advocacy has been conflated with **activism**, because the behaviors that individuals engage in can overlap. While similar, advocacy can involve either an internal pathway of influence through direct contact with decision-makers, or an external pathway of influence through contact with others who influence decision-makers. Alternatively, activism typically involves an external pathway of influence and relies on techniques of pressure and persuasion to challenge oppression and push for change. Watts and colleagues (2003) have offered a simple definition of activism, namely, doing something about oppression. Advocacy often occurs within a system with the assumption that with enough sharing of information the system will respond effectively. On the other hand, activism is more likely to indict the system and take an approach that recognizes the rigid nature of oppression. From a societal level, advocacy and activism can be in alignment with the goal of **social justice**. Social justice has the goal of promoting “a common humanity of all social groups by valuing diversity and challenging injustice and disparities in all its forms” (e.g., health, educational, economic, and political inequities; Leong, Pickrens & Vasquez, 2017, p. 779). Advocacy can be pursued by any individual, and training exists to increase the effectiveness of advocacy in creating social change.

Although advocacy and activism can happen in a variety of settings and be directed at various targets, **lobbying** is a form of advocacy that often occurs within the context of legislation and executive branch decision-making. Lobbying is directed at influencing governmental officials to vote a certain way or take a specific course of action and is conducted by registered lobbyists. Guidelines and policies regarding lobbying often vary from state to state depending on the arena in which one is lobbying. Another distinction is that while lobbying targets governmental laws, regulations, and services that enhance the well-being of citizens, advocacy and activism can also target institutional or organizational policy, which refer to what institutional or organizational leaders expect their members to do (Maton, 2017). These distinctions can be helpful as individuals make sense of who is the target of advocacy and the different dynamics that are at play in the realm of seeking social justice.

PSYCHOLOGISTS AS ADVOCATES



PSYCHOLOGISTS AS ADVOCATES

Psychology, as the study of the mind and behavior, has great potential to “benefit society and improve lives” (APA, 2019). Psychologists have expertise regarding the effects of societal and systemic oppression on individuals, families, communities, and larger systems given their experience as practitioners and researchers. Scholarly expertise and “on the ground” experience engender understanding related to topics such as immigration and deportation, incarceration, violence, institutional racism and implicit bias, education, poverty, mental health, and health disparities, allowing psychologists to make important contributions to inform the public and decision-makers. Advocacy provides a clear professional avenue for both practitioners and researchers to address the issues that affect communities and society by sharing their expertise as well as amplifying voices of communities not always heard in policy discussions. The people with whom psychologists work are affected by government and organizational policies and practices, and the ability of psychologists to conduct and use their research for the betterment of society and to serve individuals and communities is impacted by policies and practices of media, organizations, and governments. Further, psychologists can contribute much to important social change work being done by other

disciplines and advocacy groups whether through coalitions or in a consultative role. It is imperative that psychologists’ knowledge and voices inform social and institutional policies, despite challenges and risks involved in advocacy work as discussed later in this toolkit.

There are numerous examples of the important contributions psychologists have made to the betterment of society through advocacy. At the national level, these include advocacy efforts that resulted in influential national legislation, executive branch rules and regulations, and precedent-setting Supreme Court decisions. Sometimes the contributions of psychologists are in the forefront of an advocacy effort and other times psychological research and perspective add to a cumulative effort of many disciplines. The examples below provide a glimpse of the contributions a few psychologists have made in successful advocacy, influencing important national legislative, executive branch, and judicial policies (for more examples, see Maton, 2017).

- Testimony and research of Mamie and Kenneth Clark influencing *Brown v. the Board of Education* (1954)
- Development of Head Start and related early childhood initiatives (Urie Bronfenbrenner and Edward Zigler; Zigler & Styfco, 2010)
- Housing First Initiative, an executive branch policy addressing the issue of homelessness advocated by Sam Tsemberis and Marybeth Shinn. (Maton,

2017, pp. 182-185)

- Maternal, Infant, and Early Childhood Home Visiting Bill (David Olds; Maton, 2017, pp. 64-68)
- Expert testimony (Greg Herek; Maton, 2017, pp. 89-90) focused on overturning California's ban on gay marriage
- Expert witness testimony regarding bias in employment assessment (Janet Helms; pp. [11-12](#))
- Expert witness testimony regarding discrimination against women in the workplace (Susan Fiske; Maton, 2017, pp. 86-89).

At the state and local levels, psychologists have also been engaged in many important efforts ongoing over decades. These efforts may not be as visible as national legislation, executive branch programming or judicial decisions yet they have had important impacts on the well-being of individuals, families and communities. Examples include:

- Leading a statewide effort in Connecticut to divert status offenders (non-criminal offenses such as running away from home or being truant from school) from the juvenile justice system (Preston Brittner; Maton, 2017, pp. 68-70),
- Preserving affirmative action at the University of Michigan (Nancy Cantor, Patricia Gurin; Maton, 2017, pp. 197-198, 250-252),
- Contributing to innovative programming for undocumented immigrant families in

New York City (Hiro Yoshikawa; Maton, 2017, pp. 201-203)

- Contributing to a community organizing effort that generated substantial funding in Camden, New Jersey to address vacant housing (Paul Speer; Maton, 2017, pp. 83-84).

Important advocacy efforts over the years have also occurred within the profession, including the removal of homosexuality as a disorder in the DSM-III (Evelyn Hooker; Floyd & Szymanski, 2007), and more recently reversing APA's policies and ethical standards regarding the role of psychologists in performing interrogations (multiple psychologists). There are countless other local examples, too numerous to name. Of note, 8 of 29 psychologists honored by APA in 2018 as exemplary citizen-psychologists were involved in local advocacy efforts (DeAngelis, 2018). Our hope is that this toolkit can assist even more psychologists to envision and put their expertise into action.

The background features a dark teal color on the left and top, and a bright orange color on the right and bottom. A large, stylized teal line starts at the top left, curves down, then right, then down again, and finally right, ending at the bottom right. This line overlaps with a large orange shape that resembles a stylized letter 'P' or a similar blocky form. The text is positioned in the upper left quadrant, overlapping the dark teal background.

**PSYCHOLOGISTS'
SKILLS FOR
SUCCESSFUL
ADVOCACY**

PSYCHOLOGISTS' SKILLS FOR SUCCESSFUL ADVOCACY.

Psychologists bring to bear multiple sets of skills shown to be important for successful advocacy (Maton, 2017).

- *Relationship building skills.* From working with one's graduate school advisor and committee members, to negotiating one's first professional position, to interacting with strangers at a conference, many psychologists have the skills to navigate a variety of interpersonal situations. These skills are helpful in all domains of the policy arena, including development of trusting working relationships with policymakers and their staff. Such relationships typically are built upon mutuality, including the willingness to provide information or other resources of value in a timely manner to policymakers, as well as an understanding of confidentiality surrounding sensitive information.
- *Communication skills.* Psychologists are frequently teaching others, even when we do not realize it. Teaching often occurs outside of the traditional classroom. Sometimes, we are explaining our current research project to a relative at a family dinner; other times, we are sharing our area of expertise with a new

acquaintance at a conference. Psychologists who have experience and/or training working in applied or non-academic settings are already skilled in the task of translating complex research findings into a user-friendly and concise format with clear, jargon-free language. These skills will be important when we engage in advocacy via direct communication, such as face-to-face meetings with stakeholders or policymakers. In addition to oral communication, psychologists are trained to have strong written communication skills. These skills are essential when writing policy reports and recommendations or media pieces for broad audiences. Our oral and written communication skills are applicable to advocacy work with community members, coalition partners, legislators, executive branch officials, and in the judicial context. It is also important for us to be flexible in adjusting the way our ideas are communicated and presented depending on the audience, their priorities, and their perspectives.

- *Strategic analysis skills.* Strategic analysis encompasses both policy analysis and strategy development (Maton, 2017). Psychologists are able to critically evaluate social problems, generate potential solutions, and formulate a plan of action to achieve a policy goal. **Policy analysis** may include the generation of novel policy approaches for a given social issue, contrasting benefits and limitations of differing approaches, and exploring both systemic and unintended

consequences of proposed policy approaches. **Strategy development** includes identifying the policymaker who needs to be targeted to effect change, and the pathways through which we can share our findings, perspectives, and expertise with that individual or group. Our capacity and training in complex strategy development to influence outcomes will prove helpful in this regard. More generally, many psychologists are trained in an ecological model (e.g., considering individual and systemic factors), which incorporates multiple levels of analysis, a useful framework for understanding complex policy issues and working in the policy realm.

- *Research skills.* Policy can be influenced by various types of research, including evaluation research, applied theory-based research, and systems-focused research. These skills allow us to generate policy-relevant findings, and to synthesize and translate findings to contribute to policy change. Our research skills also help us to critique the quality of research that may be used to support the efforts of those working in opposition to our policy goals. From a different perspective, research skills can be applied in novel ways for the purpose of doing policy advocacy. For example, you review a legislator's record (this is akin to conducting a literature review), and you gather that this legislator is amenable to your cause and would be a good ally (formulating a hypothesis).

Therefore, you reach out to this person with your idea and try to persuade them to support your cause (hypothesis testing). Based on the legislator's response (collecting data), you gauge whether they are, indeed, an ally to your cause (interpreting the data) and decide on the next steps (developing future directions).

THE POLICY ARENA



THE POLICY ARENA

The policymaking process is highly complex—comprising multiple phases, levels, policy players, and sources of influence (Maton, 2017). The four primary phases of the policy cycle are agenda setting (e.g., determining what policies will be addressed during a legislative session), policy formulation and adoption (e.g., writing and passing legislation), policy implementation (e.g., the process of applying/carrying out passed legislation), and policy evaluation and revision (e.g., reviewing the efficacy of the legislation in addressing the targeted policy issue and altering the legislation or implementation as needed). These phases are interactive and iterative, and this dynamic and cyclical nature plays out at interrelated local, state, and national levels. Policy players (stakeholders) include officials in the legislative, executive, and judicial branches of government, advocacy and intermediary (e.g., professional and advocacy) organizations, researchers, citizens, health care organizations and institutions, and the media (including social media). Sources of influence on policymakers include politics, events, values, evidence, expertise, capacity, ideology, interests, relationships, networks, and existing social problems and available solutions. Psychologists can and have exerted important policy influence in all phases and levels of the policy process, from multiple vantage points and policy player roles, while also drawing on multiple sources of influence.

GETTING STARTED IN ADVOCACY



GETTING STARTED IN ADVOCACY

Those who are not yet involved in advocacy work, including graduate students and early career psychologists, may wonder how they can become involved. Here are practical suggestions for entering and engaging with the policy world:

Participate in the policy committee of your professional society (e.g., division of APA, State Psychological Association). Many policy committees actively seek out and desire the help of graduate students interested in both general policy work and specific policy initiatives. Additionally, many State Psychological Associations have advocacy days where they teach individuals how to speak with state legislators. APA also has multiple committees for students (e.g., Science Student Council) where students may gain experience advocating on behalf of social scientists at the federal and organizational level. For examples of APA's student groups follow the links below:

[Science Student Council](#)⁸

[APA Campus Ambassador](#)⁹

[State Psychological Association chapter](#)¹⁰

Volunteer for or join a policy-oriented organization (e.g., advocacy organization) related to your research or personal experience. Individuals may also find student-run

advocacy groups on their campuses (e.g., graduate student councils, LGBTQIA+ and ally groups). Furthermore, many universities partner with non-governmental organizations (NGOs) and other advocacy groups in their respective communities. Students may want to seek out these groups as communication and infrastructure for advocacy are already established within these organizations.

Seek out faculty, university research and policy institutes or centers, and practitioners actively involved in policy work, and **ask** about ways to get involved in specific policy-relevant projects.

Apply for APA, The Society for the Psychological Study of Social Issues (SPSSI), or Society for Research in Child Development (SRCD) Congressional fellowship programs, or policy internships in your specific area of interest.

Learn to ask policy-relevant questions through exposure to:

- Policy-relevant coursework in psychology and other disciplines
- Ecological and systemic theories
- The policy focus and related products (i.e. briefs and reports) of advocacy organizations and policymakers in your area(s) of interest.

Invite input from policy-informed faculty and/or policy practitioners on how to increase the policy relevance of your research projects (e.g., master's thesis,

dissertation, grant proposals) early in the planning process.

Gain experience working in the settings and with the populations you hope to collaborate with, to understand first-hand the contextual realities that policy must consider and the real-life impacts of policy. This includes volunteering to serve in various capacities (e.g., as youth mentor, board member) in organizations that serve the populations that you want to work alongside.

Consider engaging in your student body. Most graduate programs have student councils where individuals can volunteer or run to be a representative in the student senate body. Individuals can also try to organize other grassroots movements such as on-campus postcard drives or voter registration.

Become knowledgeable on legislative processes and decision-makers. This advocacy toolkit is one starting point. You may also want to consider these following suggestions:

- Identify your [state](#)¹¹ and [federal](#)¹² legislators.
- Stay informed about local legislation by:
 - ▷ Attending city council or town hall meetings
 - ▷ Attending events where your local official will make an appearance
 - ▷ Subscribing to local legislators' newsletters

- ▷ Reading local newspapers that report about issues that are more relevant to your specific community.

A PRIMER ON ADVOCACY

23 Focusing Effort

28 Strategic Analysis

A PRIMER ON ADVOCACY

Important steps for advocacy can be grouped into two processes: (1) **focusing effort** and (2) **strategic analysis**. Focusing efforts entails identifying issues, advocacy target, level of advocacy, and type of involvement. Strategic analysis includes developing goals, identifying stakeholders, allies, and opponents, identifying decision-makers and relevant committees, and choosing a policy influence method.

Here, as an example, we outline steps to consider taking when engaging in legislative advocacy (Figure 1), which is best pursued when there is a clear set of strategies and goals. Although these steps are not meant to be prescriptive in their ordering, use of this approach can be helpful in organizing legislative advocacy efforts at the federal, state, or local level, and for non-legislative advocacy as well. First, and throughout the advocacy process, it is important to clarify values.

Focusing Effort

CLARIFYING VALUES

Clarification of values is important when engaging in advocacy as values drive stakeholder accountability and keep individuals aligned towards the same goals and solutions. Clarification of values also helps individuals and groups decide whether

and with whom to develop partnerships. Although clarifying values is an important initial step, this should be an on-going process.

Things to consider:

- Create group agreement or mission
- Post agreement on mission in public spaces, including social media
- Reiterate values at regular advocacy meetings

IDENTIFY PROBLEMS AND ISSUES OF INTEREST

Identifying a clear and specific problem and an actionable issue (i.e., possible solution to at least one aspect of that problem) is one of the first and most critical aspects of engaging in advocacy work. Some psychologists will have an area of existing clinical and/or research expertise within which they are interested in engaging in advocacy (i.e., problem area of general focus such as poverty); the challenge for them may be finding a specific policy “issue” within that larger area of expertise on which to focus (e.g., a researcher who focuses on poverty could advocate about the importance of the Supplemental Nutrition Assistance Program, formerly known as food stamps).

Advocacy can also involve identifying the root of a social problem, which may resolve many of the related negative symptoms or outcomes. As an example, health care professionals, including psychologists, in the 1990’s saw a problem with mental illness, mental health stigma, as well as

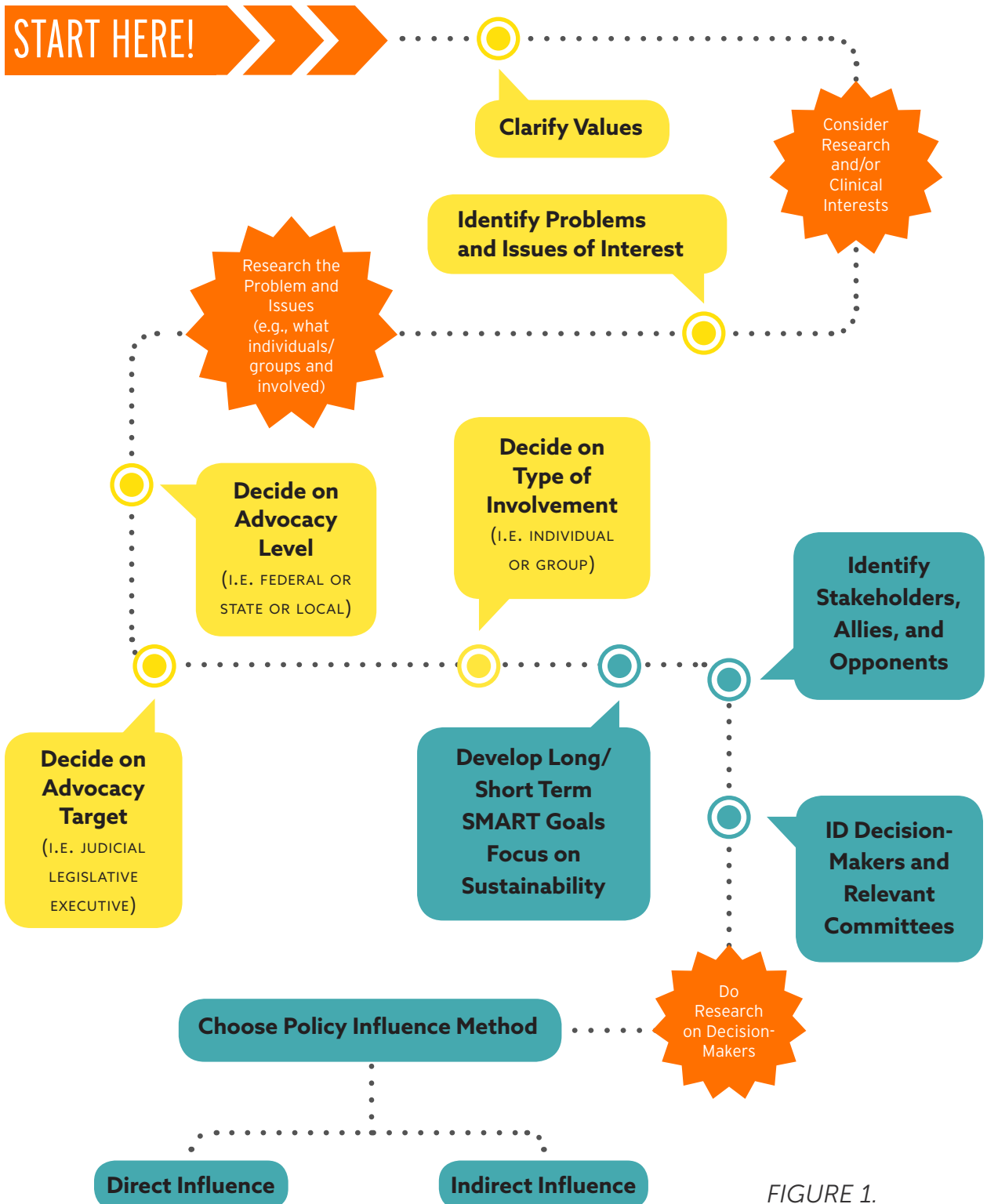


FIGURE 1.

ENGAGE IN SELF-CARE AND BE MINDFUL OF ETHICAL AND MULTICULTURAL CONSIDERATIONS

people's lack of access to mental health services within their communities. With the lack of clear Federal legislation (until the 2000s), advocates addressed this problem by tackling the actionable issue of mental health parity to ensure coverage for mental health problems.

Things to consider:

- Without a clear understanding and identification of the problem, advocacy efforts may merely address the symptoms.
- When asking communities to discuss some of the problems they experience, the responses may sometimes be numerous negative symptoms of a single root problem.
- Deciding on the specific actionable "issue" will depend in part on what is currently on the minds of policymakers and community members (i.e., is there a "policy window" open to take advantage of at the moment)
- Deciding on the specific "issue" will depend on the feasibility of relevant solutions related to that issue

RESEARCH THE PROBLEM AND ISSUES

Research regarding previous and current advocacy efforts is important as it can determine previous successes/failures and help to clarify whether this is the right time to pursue the action. In this process it is important to be mindful of unintended consequences of engaging in advocacy.

Things to consider:

- Whether this is a priority of the community
- Budget and resources
- Priorities of any funders and donors
- Length of time required for advocacy plan (e.g., years vs. days)
- Feasibility of influencing decision-makers
- Timing of advocacy efforts
- Whether others are (have been) working to address the issue
- Whether the identified problem is a symptom of a larger one

DECIDE ON ADVOCACY LEVEL

Individuals should consider advocacy at the federal, state, or local level. Although much attention is placed at the federal level, we focus attention here on targeting advocacy efforts at the State and Local level as one way of influencing law and policy.

Things to consider:

- State governments typically follow a similar structure as the Federal government. That is, State governments are comprised of executive (e.g., governor), legislative (e.g., assembly, senate), and judicial branches (e.g., courts).
- State legislative processes follow a clear process with many avenues for advocacy. Each step in the process can be a site for action. Although processes for bills to become law may vary state by state, the typical path follows similar steps. An

example of state-level legislative processes can be found by [clicking here](#)¹³.

- Local governments (e.g., city, town, townships, boroughs, etc.) are comprised of an executive (e.g., mayor, president, directors of health and human services) and council members. [Click here](#)¹⁴ for more information on local government processes.
- School superintendents and school board members also are critical decision-makers that exert influence on local matters.
- Knowledge of “informal” power structures (e.g., networks in the business/corporate, non-profit, or philanthropic sectors) and relationship-building with these individuals may also help advocacy for marginalized individuals at the community-level (e.g., including unincorporated communities with little formal government, other institutions). Organizational policy also may be a target for advocacy efforts.

DECIDE ON ADVOCACY TARGET

Once an individual decides to engage in advocacy to address the identified issue, they may choose to focus their efforts on a target (i.e., judicial, legislative, executive, organizational).

Things to consider:

- Federal and State governments are based on a system of checks and balances involving three co-equal branches (i.e., executive, legislative, judicial). Therefore, it is important for

psychologists to consider how to potentially influence one branch of government through advocacy in other branches (e.g., legislators can influence executive agendas through their role in oversight, appropriations, as well as regulatory bodies).

- Relationships formed with local representatives may be more personable and can be leveraged for change efforts.
- ***DECIDE ON TYPE OF INVOLVEMENT***
Individuals will need to decide on whether to engage in advocacy efforts on their own or form/identify groups with which to ally.

Things to consider:

- Research conducted at the preliminary stages of thinking about advocacy should yield information regarding whether efforts have been undertaken in the past. This should help to identify groups that are/were engaged in advocacy efforts. These groups may provide information, advocacy partners, structure, and organization that individuals can find beneficial.
- Psychologists should consider ethical principles of integrity and fidelity as well as their own ability before making commitments to groups.
- As you understand more about the issue, “snowballing” techniques may be used to identify more allies who can provide more perspective and depth to your advocacy efforts, than your initial research yielded.

- Think about your relationship with the group or individual with which you are advocating. For instance, psychologists are encouraged to consider whether inviting others to advocate with them would reveal aspects of their life that they are not ready for others to know (e.g., identifying an individual's sexual orientation). Or, if advocating on behalf of a group, be sure to consider your own identity as a person inside or outside the group. Do individuals from the in-group want to be involved and if so, are you facilitating or hindering that process?

Strategic Analysis

DEVELOPING SHORT/MID/ LONG-TERM SMART GOALS

Engaging in research on the issue to learn what efforts are being/have been initiated within your state/local context will help to establish your short/mid/long-term goals. For instance, if no effort has been undertaken previously, a short-term goal may include gathering stories (personal experiences) of those who have been affected by organizational, local, or state policy.

Things to consider:

- Change in state, local, or organizational policy often entails sustained effort. Thus, individuals engaged in advocacy need to consider individual- and organizational-level capacity.
- Sustainable advocacy efforts often rely on clear roles, tasks, and consideration

of a pipeline for leadership.

- Specific, Measurable, Achievable, Relevant, and Time-Limited (**SMART**) goals also may aid in sustaining individual and group efforts.
- Recognition of success (e.g., small wins) helps to maintain morale.

IDENTIFY STAKEHOLDERS, ALLIES, AND OPPONENTS

In advocacy work, it is important to identify stakeholders (i.e., those directly and indirectly affected by the issue and proposed change).

Things to consider:

- Visually map out your network to identify those who may help develop ideas or have knowledge/experience to build your power base
- Research who in the community may be interested in your advocacy and what influence they may bring

Here is a more in-depth tool for [working with stakeholders in an advocacy role](#)¹⁵.

IDENTIFY DECISION-MAKERS AND RELEVANT COMMITTEES:

Key decision-makers need to be identified. Relationships with these individuals/groups need to be developed and nurtured.

Things to consider:

- A "decision-maker" is an individual or a group of individuals (e.g., committee chair and voting members) in a position of power over decisions regarding a

specific policy. Decision-makers include elected officials (e.g., council members, state senators), appointed officials (e.g., local health director, chief of police), or board members (e.g., board of directors of a hospital, school board members, head of library).

- Identifying the chairperson of a state senate committee may be one pathway for introducing legislation. Another pathway may be to identify the chairperson of the appropriations committee to begin your advocacy. A third pathway is to identify your elected representatives.
- Key decision-makers may include unelected or informal leaders in a community or organization, as well as elected or formal decision-makers. Across situations, it is imperative to understand the power dynamics of the “governing” entity so that you can correctly identify and build a relationship with the right people. This may require considerable resources, with additional time, effort, and dialogue needed to consider complex, intersecting factors such as culture, religion, or race/ethnicity/nationality, that may vary in salience across contexts.

RESEARCH DECISION-MAKER

Whether the decision-maker is elected, appointed, or selected, advocacy entails conducting background research to learn more about the decision-maker. Understanding their values, as demonstrated by past legislative action, policy statements, or

donations, can help to direct advocacy efforts.

Things to consider:

- Utilize local, state, or federal websites to review previous bills they have supported or opposed
- Review donor sources
- Read news articles or sign-up for newsletters where they discuss their positions
- Follow them on social media or other web-based platforms
- Talk to advocacy groups or others who are knowledgeable about the decision-maker

CHOOSE POLICY INFLUENCE METHODS

After researching the decision-maker, it is important to choose policy influence methods. Broadly these methods can include direct and indirect methods. The next section provides an in-depth overview of several policy influence methods.

POLICY INFLUENCE METHODS

- 32 Direct Advocacy Methods
- 36 Direct or Indirect Advocacy Methods
- 39 Indirect Advocacy Methods

POLICY INFLUENCE METHODS

There are many different methods available to psychologists for engaging in advocacy or policy change. These methods vary across several dimensions, outlined below.

DIRECT VS. INDIRECT PATHWAY

This dimension focuses on whether you directly engage with policymakers in your advocacy or policy change efforts. The direct (internal) engagement pathway involves contact between psychologists and decision-makers in the policy realm (e.g., representatives, superintendents, chiefs of police) whereas the indirect (external) pathway involves psychologists interacting with others (e.g., intermediary or advocacy groups, media outlets, other health professionals) who in turn influence decision-makers. For example, a direct pathway for advocacy might involve meeting with a local policymaker, while an indirect form of advocacy could be writing a letter to the editor on a policy issue in a local newspaper.

POLICY TARGET

This dimension focuses on which decision makers, and which decision-making unit, you want to influence. Some examples of the latter include: the legislative branch, executive branch, or judicial branch of government, or local non-governmental organizations (e.g., a school or hospital).

MECHANISM

This dimension has to do with the underlying means of influence through which psychologists attempt to make a difference in the policy arena. There are four primary means for influencing the decisions made by policymakers:

- *Education* (e.g., providing a fact sheet summarizing research on a policy issue)
- *Guidance* (e.g., providing policy recommendations based on research)
- *Persuasion* (e.g., using personal narratives to highlight the personal impact of a policy issue)
- *Pressure* (e.g., staging a protest).

Education and guidance focus on providing information and knowledge to inform decision-makers, while persuasion and pressure are intended to more directly exert influence on decision-makers and their choices. Psychologists have drawn on psychological theory, research, and personal experience to generate principles and practical guidelines for effective enactment of these mechanisms in different contexts (e.g., Bogenschneider, 2014; Brownell & Horgen, 2003; Culp, 2013; Haney, 2006; Jason, 2013; McNair, 2018; Pettigrew, 1988; Shinn, 2007; Wolff, 2010).

Psychologists may employ combinations of the advocacy dimensions described above, in different contexts, to educate or exert influence on the policymaking process. For example, if a psychologist is on a policy advisory group this would be an example of direct advocacy through the executive or

legislative branch, using guidance and education techniques. Alternatively, a psychologist might engage in advocacy by consulting for a non-profit and this would be an example of indirect advocacy through a non-governmental organization using education and guidance. A set of policy influence methods used frequently are described further below, separated into Direct, Direct or Indirect, and Indirect pathways. Information about how to get started, links to "how to" resources, and brief examples of psychologists who have used each method to successfully influence policy are provided. As noted earlier, there are multiple phases of the policy process and the methods selected may depend in part on whether the advocacy focus is to influence agenda setting, formulation and adoption, policy implementation, or policy evaluation and revision.

Direct Advocacy Methods

Direct Communication

FACE-TO-FACE MEETINGS

This direct path to influencing policy involves meeting with legislators, executive branch officials, or other decision-makers as a private citizen or professionally as a psychologist to discuss legislation, executive branch rules or regulations, or an issue of importance (e.g., poverty, inclusion practices in schools). These meetings can be set up by the psychologist, by a policy-maker, or by a third-party group (e.g., an advocacy organization or professional association). Face-to-Face meetings are

especially appropriate at local levels where the policymaker(s) may be within one's community, and thus provide the opportunity for developing longer term relationships (see consultative relationships below). Depending on the goals and nature of the meeting, the psychologist could apply one or more of the mechanisms of influence (i.e., education, persuasion).

HOW TO GET INVOLVED: Direct meetings with a legislator or their staff are a great opportunity to directly convey messages to policymakers. You can [use this website to find links](#)¹⁶ that allow you to access contact information for your elected representatives at multiple levels of government. When meeting with an elected official or their staff, or any decision-maker, it is generally a good idea to come prepared with specific talking points about the issue you are trying to advocate for. You can find more guidance on preparing for a direct meeting by [clicking here](#)¹⁷. In addition to in-person meetings, you can call or email your legislators to provide feedback on particular legislation or to speak about your concerns as a constituent. The following resources can be useful for [emailing](#)¹⁸, [calling](#)¹⁹, or [writing](#)²⁰ your elected officials.

Psychologist Rebecca Campbell took part in multiple face-to-face meetings with local (Detroit police department), state (Michigan governor and attorney general of Michigan), and federal (U.S. vice president and attorney general) officials to advocate for required testing of rape kits. Campbell's action-based research contributed to

the identification of 11,000 untested rape kits stored in a Detroit warehouse (Campbell et al., 2015). These meetings and related advocacy efforts resulted in local, state, and national policies requiring the testing of rape kits.

SEMINARS FOR LEGISLATORS

Seminars are arranged by an organization, often universities, to share research knowledge/information with policymakers. The primary mechanism of influence at these events is education. Generally, the legislators select a topic that is relevant to the current legislative agenda and then psychologists with expertise in these areas are invited to participate in the seminar. At the local level, school boards, city councils, and other policy boards could be appropriate venues for a seminar depending on the issue and the process for decision-making.

HOW TO GET INVOLVED: An established policy-oriented seminar that exists across multiple states is the [Family Impact Seminar](#)²¹. The seminars provide policymakers with research relevant to legislation on family issues (e.g., education, juvenile justice). One option for getting involved in seminar work would be to reach out to the Family Impact Institute to learn more about participating in an existing seminar or setting up a seminar in your state. You may also be able to create a seminar focused on local concerns by coordinating with psychologists and policymakers in your region. For example, by communicating with policymakers or local government officials you may be able to identify issues on the

policy agenda that you or your colleagues have expertise in and create a seminar where this knowledge can be shared.

Psychologist Karen Bogenschneider, as executive director of the Wisconsin Family Impact Seminars, brought together state legislators, legislative aides, Governor's Office staff, executive agency officials, and others, to hear policy-focused presentations from researchers on topics the policymakers had selected as high priorities for action (Bogenschneider & Corbett, 2010; Maton, 2017, pp. 70-72).

GOVERNMENT HEARINGS

Hearings are arranged by legislative committees. Presenters, including psychologists, are invited by legislators to attend and provide on-record information about the policy issue being discussed. Psychologists participating in this type of hearing will have an allotted amount of time to present their information and then respond to questions. Psychologists are generally invited based on their expertise in the area of focus.

HOW TO GET INVOLVED: One way to get involved in government hearings is to come to the attention of policymakers through your work position or research. Alternatively, reaching out to policymakers or volunteering one's time and knowledge may allow a psychologist to be identified by policymakers as someone with interest and expertise for a government hearing. Another opportunity for providing feedback during the policymaking process is by

writing public comments on regulations as part of the rulemaking process, at all levels of government. Tips for writing effective comments on proposed regulations can be found by [clicking here](#)²². Additional information about the regulatory process and opportunities for public comment (at the federal level) can be found here on the [Federal Register website](#)²³.

Psychologist Jeanne Brooks-Gunn was invited to present at a hearing on home visiting programs based in part on her published review of evaluation studies of existing home visiting programs (Howard & Brooks-Gunn, 2009; Maton, 2017, pp. 65-66).

GOVERNMENT BRIEFINGS

Briefings are another type of meeting where psychologists can provide legislators or their staff members with information about policy-relevant research. Similar to hearings, a panel of invited experts, including psychologists, will present information and then respond to questions. These briefings are often sponsored by professional and advocacy organizations.

HOW TO GET INVOLVED: Government briefings may be arranged and coordinated by intermediary organizations on a topic relevant to their policy agenda. Similar to getting involved with government hearings, being publicly active in your area of expertise will likely assist in your work being brought to the attention of intermediary organizations or policymakers arranging government briefings.

The National Prevention Science Coalition sponsored a congressional briefing on reducing poverty via evidence-based prevention science, and invited research psychologists Lawrence Aber, Anthony Biglan, and David Olds to provide presentations to the audience of policymakers and staff (e.g., [a briefing on evidence-based research to reduce poverty](#)²⁴).

POLICY CONFERENCES AND MEETINGS

Presenting at conferences or professional meetings that individuals involved in policy-making attend is another important way that research findings can be disseminated to policymakers. These conferences are usually less research specific, focusing more on policy-relevant topics that government officials can apply in their work.

HOW TO GET INVOLVED: Psychologists may be able to attend policy-relevant conferences or professional meetings by invitation or by submitting relevant research findings for consideration as a presentation. For policy-relevant meetings that do not have a formal presentation submission process, psychologists could contact program organizers and request to present or meet with attendees regarding the relevant advocacy issue.

Psychologist Mark Lipsey was invited to present findings from his meta-analysis of juvenile justice interventions at meetings of Juvenile and Family Court Judges and the National Institute of Justice; these presentations were part of his pathway to policy influence, including state juvenile

justice departments adopting a standardized program evaluation protocol he developed to guide program selection and improvement (Lipse et al., 2010; Maton, 2017, pp. 192-193).

Policy Advisory Groups

COMMISSIONS AND TASK FORCES

This is a direct means of influencing policy that generally involves psychologists being invited by the legislative or executive branch, or a local organization such as a school, to join a group that is reviewing a specific policy issue (e.g., child welfare). At the local or state level, these groups may be created within state or local government, schools, or other public serving entities. Engaging in advocacy through commissions (e.g., Human Relations) and task forces (e.g., Opioid Use) generally involves identifying the decision or policy group, reviewing current policy, considering potential alterations based on research/expertise, and providing actionable suggestions for change (e.g., guidance). The resulting product might be a policy report or a “white paper.” These groups are also sometimes referred to as boards, committees, or councils.

HOW TO GET INVOLVED: Similar to getting involved with government hearings, being active in your area of expertise (practice and/or research) in the public arena will likely assist in your expertise being brought to the attention of policymakers organizing government hearings.

Psychologist Allen Ratcliffe has served on multiple advisory groups over the years in Tacoma, WA (e.g., City Human Services Commission; County Mental Health Advisory Board; Tacoma Landmarks Preservation Commission). His request to the Human Services Commission led to the first local ordinance in the State of Washington to protect individuals with disabilities against housing discrimination. His policy contributions sometimes resulted from his role as Director of the Community Mental Health Center, and when he retired from that position, as a volunteer and citizen (Maton, 2017, pp. 237-238).

Courtroom-Focused

AMICUS BRIEFS

Meaning “friend of the court,” amicus briefs are written documents by groups or individuals not involved in the court case that are submitted to provide additional information related to issues being addressed in the case. APA, for example, has contributed many amicus briefs in major court cases over the years, with psychologists with expertise in the area under review by the court invited by APA staff to help prepare the briefs.

HOW TO GET INVOLVED: If you are not invited to participate in the writing of an amicus brief, you could reach out to relevant professional organizations such as the APA to determine if they are planning to prepare an amicus brief. If they are, you could inquire if you could participate or contribute in some way. If the organization

is not, you may be able to engage in advocacy to encourage the organization to participate in preparing a brief.

Psychologist Gregory Herek played a key role preparing the amicus brief APA submitted on an important gay rights marriage case in the State of California. He was invited by APA to contribute due to his research expertise in the area (Maton, 2017, pp. 89-90).

COURT TESTIMONY

Psychologists may be asked by legal counsel to testify as an expert witness. A judge must determine prior to the presentation of information if it is considered “scientifically valid.”

HOW TO GET INVOLVED: Based on relevant research or expertise a psychologist may be hired by legal counsel to serve as an expert witness. If you are not invited, but believe you have pertinent knowledge, you could reach out to legal counsel and inform them of your relevant knowledge and willingness to participate in the case.

Psychologist Susan Fiske, based on her research in the area of gender stereotyping, prejudice, and discrimination, was an expert witness in a precedent-setting case outlawing gender discrimination in the workplace (Fiske et al., 1991; Maton, 2017, pp. 86-87).

EXPERT REPORTS

These reports are similar to court testimony; however, the information is provided as a written document and is then submitted

into evidence. This may include research findings that are intended to influence the court’s decision.

HOW TO GET INVOLVED: A psychologist may be invited to write a report, as in the case of court testimony described above. Another potential means for getting involved would be to reach out to a legal team if you have relevant expertise or information and offer to be involved in the preparation of a report.

When the University of Michigan was sued by a White student due to its admissions procedure providing extra consideration for students of color, given her relevant research psychologist Patricia Gurin was asked to prepare an expert report in support of the race-conscious admissions processes (Gurin et al., 2004; Maton, 2017, pp. 197-198).

Direct or Indirect Advocacy Methods

Consultation

CONSULTATIVE RELATIONSHIPS

This pathway primarily uses the guidance mechanism to provide information and ideas, either directly to policymakers or indirectly via relationships with intermediary organizations. Consultation can be structured a variety of ways in terms of the formality and length of the arrangement and may be conducted for pay or pro bono. Consultative relationships may be particularly likely to develop at local levels where

the policymaker(s) may be within one's community and thus provide the opportunity for longer-term interaction. Although consultative relationships generally occur over time and thus differ from "direct communication" (above) in which communication involves singular meetings (e.g., a Hill Visit), such longer-term relationships may follow from an initial face-to-face meeting to share information or a point of view. Establishing oneself as a resource for the community is often important in systems change as well as policy change and over time can lead to formal consultative or advisory roles.

HOW TO GET INVOLVED: Consultative relationships are likely to evolve over time through interactions with policymakers (and their staff) or intermediary organizations and the development of a mutually trusting relationship. At times, these consultative relationships may be formalized through a written agreement and/or pay. Building such a relationship would likely involve prior direct communication with the policymaker or intermediary organization and the provision of helpful education/guidance based on research or applied knowledge. [This resource](#)²⁵ provides additional information about growing community connections.

Psychologist Kira Banks, based on her expertise in discrimination and racism, was asked to serve as a Racial Equity Consultant to the Ferguson Commission in Missouri.

TECHNICAL ASSISTANCE

This pathway includes the creation of deliverables to policymakers or advocacy organizations, such as policy analysis, evaluations, guidance on program implementation, and literature reviews.

HOW TO GET INVOLVED: Psychologists interested in offering deliverables to organizations or policymakers can get in touch with those groups or individuals to offer their time to support advocacy or policy efforts. For example, if a policy proposing reduced access to meals at school was up for discussion at your local school board, you could offer to prepare a literature review on the importance of childhood nutrition access for the opposing side.

Psychologist Hiro Yoshikawa sent his book on the challenges facing undocumented immigrant families in New York City (Yoshikawa, 2011) to a powerful advocacy organization, which used the findings to successfully lobby the City Council for new program funding for literacy education for undocumented parents. Yoshikawa then provided technical assistance by utilizing his knowledge to enhance program implementation (indirect pathway of influence; Maton, 2017, pp. 201-203).

Policy-Relevant Documents and Products

POLICY REPORTS

This type of report is often the product generated by an advisory group, as described above, or may be commissioned separately by a government body or intermediary organization. These reports

generally summarize existing research and policy related to a social problem and provide suggestions for policy changes.

HOW TO GET INVOLVED: Similar to other involvement, psychologists are often invited by relevant officials to participate in the preparation of a policy report. Psychologists may be able to bring themselves or their work to the attention of policymakers by engaging in communication with the policymaker or working with an intermediary organization.

Psychologist Brian Smedley directed the groundbreaking Institute of Medicine report, *Unequal Treatment*²⁶, which systematically highlighted the extent of racial and ethnic differences in health care, the factors contributing to the differences (e.g., bias and discrimination), and recommended policies to reduce the discrepancies, some of which later were incorporated into law (Maton, 2017, pp. 119-121).

POLICY BRIEFS, RESEARCH BRIEFS, AND FACT SHEETS

These are brief documents (e.g., 1-2 pages) that summarize pertinent knowledge and viewpoints that can be easily disseminated to and understood by policymakers and their staff. This information is also often included on an organization's website, thus clearly stating the organization's stance on an issue and providing these quick facts to the public.

HOW TO GET INVOLVED: A policy brief or fact sheet could be prepared by a psychologist upon the request of a policymaker or

intermediary organization. A psychologist could also offer to create a brief for an organization if they think it is relevant and the organization is open to this. In addition, a psychologist could create a policy brief or fact sheet to bring with them to a meeting or Town Hall with a policymaker. More information about writing a fact sheet and relevant examples can be found by [clicking here](#)²⁷ and [here](#)²⁸.

Psychologist Leonard Jason and colleagues, in partnership with an advocacy group, distributed policy-relevant evidence about the limited use of child passenger restraints to Illinois state legislators, directly contributing to legislation to address the problem (Jason, 2013, pp. 120-122).

PUBLICATIONS

Research publications or books that focus on policy-related issues can be an important tool for influence. Although most policymakers are unlikely to read research publications, empirical research is often something included in the advocacy work of psychologists and advocacy organizations, including in policy briefs or media pieces.

HOW TO GET INVOLVED: If you have published a book or article that is policy-relevant, sharing it with a policymaker or an intermediary organization that is interested is one way to enhance the likelihood of it informing policy (see Yoshikawa example above). To enhance the policy relevance of your research, ideally you

would consult or collaborate with policy experts in the area. It is also useful to include a specific section in publications that identifies policy implications of the research. This [document](#)²⁹ provides additional information about how to make research more policy relevant.

Psychologist Patricia Chamberlain published multiple studies demonstrating an effective strategy to provide behavioral management parent training to foster parents (Chamberlain, Price, Reid, & Landsverk, 2008; Chamberlain & Reid, 1991). Based on the positive findings and the consultation services that she and her colleagues provide, the model has been widely adopted in local and state foster care systems around the country (Maton, 2017, pp. 186-187).

TOOLS

This includes the creation of deliverable products that can assist in policy making or policy work that is guided by research evidence. Tools might include assessment instruments, curricula, manuals on implementation, or resources for program evaluation.

HOW TO GET INVOLVED: A psychologist who has the resources and expertise to create a policy-relevant tool (e.g., a curriculum or assessment focused on policy issues) could develop and disseminate this to groups that may find the materials beneficial. Creating a tool also affords an opportunity to engage with an impacted community or intermediary organization, beginning

the process of establishing a collaborative relationship, sharing knowledge, and seeking stakeholder input. A psychologist might also be able to create a tool as part of the outcome of a research project or incorporate a deliverable of this nature into a research grant to assist in the funding of a policy-relevant outcome. Additional resources for program evaluation tools can be found by [clicking here](#)³⁰.

Psychologist Marybeth Shinn developed an empirical targeting and screening tool which the New York City Department of Homeless Services uses to direct services to those individuals found to be at high risk of homelessness (Shinn et al., 2013; Maton, 2017, p. 183).

Indirect Advocacy Methods

External Advocacy

External advocacy usually involves working with advocacy or professional organizations. The psychologist may help the advocacy or professional organization raise public awareness about an issue or a piece of legislation, share research findings, prepare organization-sponsored reports, or serve on organizational advisory groups. External advocacy may also involve community-based social action (Bobo, Kendall, & Max, 2001), including coalition building and network building (Wolff, 2010), media campaigns, organizing public meetings, holding rallies, protests or marches, or supporting community organizing (in which trained organizers mobilize citizens who in

turn take actions to pressure officials to respond). Such community-based advocacy work should be conducted from a vantage point of cultural humility (Foronda, Baptiste, Reinholdt, & Ousman, 2016). [This site](#)³¹ provides helpful resources on how to conduct external advocacy effectively.

HOW TO GET INVOLVED: Relationships between psychologists and advocacy organizations may be initiated by the organization, for example when knowledgeable individuals are sought out to help address a policy issue at hand. Psychologists can also initiate contact to help bring their relevant knowledge, expertise, ideas, and connections into the policy arena.

Psychologist Fabricio Balcazar partnered with a community-based group of immigrants in Chicago to employ participatory action research (PAR) methods to bring about change in the immigrants' town of origin in Mexico. One of the results of the PAR was citizen involvement in successful lobbying of the state governor, persuading him to build an industrial waste water filtration treatment plant to treat a polluted river following the death of a child due to water pollution (Arrellano, Balcazar, Alvarado, & Suarez, 2015).

Media

Psychologists have expertise and skills that are useful in advocating and raising public awareness of concerns that relate to social issues or policies. Media that reaches the public often functions to indirectly

influence policy and decision-makers through public awareness.

OP-EDS

Opinion-Editorials (Op-Eds) provide an opportunity for psychologists to share information from a particular perspective, usually in print form. They tend to be longer than a letter to the editor and contain more substantive information to support the author's position. Op-Eds can be influential in helping convey important issues to the public.

HOW TO GET INVOLVED: Most newspapers have an Op-Ed section. Information about formatting and submitting your Op-Ed can be found on individual newspaper websites. The APA also [offers online guidance](#)³² for writing effective Op-Eds.

Psychologist Brian Wilcox collaborated with Planned Parenthood in Kansas to write an influential Op-Ed protesting the State Board of Education policy limiting sexual education programming to abstinence only approaches, leading to the mobilization of public opinion and policy change (Maton, 2017, p. 254; Wilcox & Deutsch, 2013).

LETTERS TO THE EDITOR

A letter to the editor is typically shorter than an Op-Ed and responds to an immediate concern in the local community or in the publication where the letter is published. A letter to the editor is an appropriate way to respond to inaccuracies that have been shared by authors or other readers and

provide psychological research or experience to suggest alternative perspectives. This avenue may also be appropriate for raising awareness and influencing public opinion related to a specific issue of concern in the community. For example, in response to discriminatory graffiti in a local community, a psychologist may write a letter to the editor expressing concern and noting the impact of such graffiti on individuals, families, and children as well as suggesting ways readers can respond to such displays.

HOW TO GET INVOLVED: Similar to Op-Eds, most newspapers and printed publications include letters to the editors with specific information about the process available on their website. Directly naming an elected official as they pertain to a specific policy is another strategy to attract attention from decision-makers as most policymakers have a process for monitoring publicity about themselves. Additional information about writing letters to the editor can be found by [clicking here](#)³³.

Psychologist Christopher Corbett published a letter to the editor ("It takes a village: Going solar to fight climate change") to provide policy guidance to elected officials of the Town of Guilderland and Village of Altamont (upstate New York; Corbett, 2017, p. 29).

PRESS RELEASES

Press releases announce new research findings or events to media sources and stimulate interest for greater media

attention. A press release is typically very short and formatted in a specific way to attract the attention of a news source and provide necessary information efficiently. One example is the recent [press release related to immigration](#)³⁴ that was a joint effort across multiple divisions of APA and psychology-related organizations.

HOW TO GET INVOLVED: The Community Toolbox provides [useful tips for creating press releases](#)³⁵.

Psychologist Irma Serrano-Garcia and colleagues on the Puerto Rico Psychological Association Policy Committee used press releases as part of an initiative to hold gubernatorial candidates accountable for adhering to ethical principles during the electoral process; the ethical principles had previously been widely distributed by the committee (Maton, 2017, p. 259).

SOCIAL MEDIA

The use of social media platforms (e.g., Twitter, Instagram, YouTube, LinkedIn, Facebook, etc.) provides avenues for sharing information and resources as well as voicing perspectives regarding timely issues and events. Psychologists are advised to base their contributions in evidence, research, and practice experience (being mindful of confidentiality issues). In addition to sharing information, over the past decade social media has been used as an important tool for raising awareness and soliciting support and participation in advocacy and community events. While social media can be an effective strategy for

organizing and consciousness raising, it is likely most effective as an advocacy tool when combined with other methods.

HOW TO GET INVOLVED: Social media platforms can be complex and there are many options to choose from with different platforms being more helpful depending on your goals. [This document](#)³⁶ offers additional information about using social media for advocacy. Further details about using social media in conjunction with other advocacy methods can be found in [this report](#)³⁷.

Graduate psychology students attending APA-sponsored Hill Visits (i.e., advocacy meetings with U.S. congressional members and staff) are encouraged to [use social media to amplify the impact](#)³⁸ of their direct face-to-face advocacy meetings by posting information about them. This is a good example of how a graduate student or psychologist with limited time can enhance the impact of their advocacy work by using social media alongside another form of advocacy (e.g., face-to-face meetings, publishing an Op-Ed) to share it with a broader, online audience.

PODCASTS

Psychologists are able to share research and scholarly expertise in a format that is customized to a particular audience. A podcast is an online series that usually focuses on different topics in each episode and provides interviews, discussion, and information.

HOW TO GET INVOLVED: One option for getting involved is to start your own

podcast focused on an advocacy issue important to you and/or your work. Given that starting your own podcast would be a major undertaking, another option is to be interviewed as a guest on a podcast. Many podcasts are interview-based, with a segment or the full podcast being an interview of a guest with knowledge relevant to the episode's content. Interviewers may be invited, but you could also reach out to a podcast that covers policy-relevant topics and explain your expertise and interest in appearing on their podcast. More information on podcasts that are science-informed and ideas for creating your own can be found by [clicking here](#)³⁹ and [here](#)⁴⁰.

There are several podcasts that have included psychologists in the production process. These include: "Naming It," focusing on racism, popular culture and the influence on communities and individuals (Bedford Palmer and LaMisha Hill); "RadioActive," bringing voices of activists and academics for discussion of structural inequality (Society for Community Research and Action); and the #SP4SJ Podcast that focuses on social justice issues (National Association of School Psychology).

PRINT, RADIO OR TELEVISION INTERVIEWS:

Policy-relevant interviews can be an important way to influence both policy-makers and citizens. They can be based on practice expertise or research related to a pressing social issue.

HOW TO GET INVOLVED: Similar to some other forms of advocacy, if you have expertise related to an area of advocacy you are interested in, you may be more likely to be invited to be interviewed on an advocacy-relevant topic. In addition, you may be able to reach out to an author or interviewer conducting coverage on an advocacy issue to bring yourself to their attention and offer your resources. Another way to get involved is by meeting with the editor of your local newspaper to request that they cover topics you are advocating about. For additional information on engaging with the media see these resources about [meeting with an editor](#)⁴¹, [research-media partnerships](#)⁴², [media strategies](#)⁴³, and [having your research in the media](#)⁴⁴. The [APA also provides useful guidelines](#)⁴⁵ for engaging with the media and suggests a number of tips for preparing for interviews, participating in the interview, and following up especially to correct inaccuracies.

Psychologist Laurence Steinberg and colleagues, based on their research findings, conducted an extensive media campaign including carefully cultivated media interviews to effectively challenge prevailing cultural attitudes and policies related to treatment of adolescents as adults in the criminal justice system (Maton, 2017, pp. 93-95; Steinberg & Scott, 2003).

INSTITUTIONAL OR ORGANIZATIONAL ADVOCACY



INSTITUTIONAL OR ORGANIZATIONAL ADVOCACY

As indicated in a number of the examples above, in addition to working on issues around legislation or executive branch rules and regulations, psychologists can engage in change-making within organizations they belong to or community organizations to help influence organizational policy and practices. Psychologists can use their expertise to advocate about justice issues, such as workplace discrimination and accessibility, within their own organization(s). For example, if psychologists were aware of unfair hiring or employee practices, this might be an area where they could engage in advocacy in the workplace. Advocacy and engagement in community organizations can similarly bring expertise in partnering with community members to address complex issues such as police violence in communities of color, school board responses to hate crimes and bullying in schools, and other such issues. Community based participatory research provides a framework for psychologists to consider engaging with communities in ways that address issues that concern the community and honoring the expertise that all bring to the table.

HOW TO GET INVOLVED: If you are aware of unfair practices in your organization, you

could get involved by broaching this topic through the appropriate channels in your organization (e.g., human resources) and, if they do not succeed, engaging in more pressuring forms of advocacy (e.g., petitions, media coverage, walkouts). It is important to note that if the policy does not impact you directly, it is highly recommended to work with individuals that are impacted to try and minimize negative backlash against vulnerable groups in an organization and to get permission to advocate on their behalf to help avoid acting as a “savior.”

A long-term campaign may sometimes be necessary in bringing about policy change in large organizations. A small group of psychologists struggled for years to reverse APA’s policies and practices concerning psychologists’ involvement in national security settings where controversial interrogation techniques were used. Their efforts spanned a number of years and were ultimately successful. Methods of influence included the use of media, advocacy meetings with APA leadership, and an APA member referendum to pressure APA (Maton, 2017, pp. 114-116).

CHALLENGES TO ADVOCACY WORK AND THE NEED FOR SELF-CARE

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CHALLENGES TO ADVOCACY WORK AND THE NEED FOR SELF-CARE

Although advocacy work can be highly rewarding, it has several challenges. As a result of giving so much of themselves in advocacy work, psychologists may neglect their own emotional and physical wellness. Below we outline some of the internal and external challenges psychologists engaged in advocacy work might face as well as methods for building resilience.

Internal Challenges

SENSE OF SELF-EFFICACY AND CONFIDENCE IN SKILL SET

Because they have been trained with a specific set of skills in the primary domains of research, instruction, and intervention delivery, psychologists may feel out of their element in the policy arena. A lack of advocacy-related knowledge, skills, and experience may result in a psychologist questioning his/her ability to succeed in creating change at the state or local level. Lack of self-efficacy can impact how psychologists approach advocacy related goals, tasks, and challenges. Similarly, doubt in one's skill set may prevent psychologists from initiating advocacy work or persisting when they encounter challenges or setbacks.

FEELING DEFEATED

Undoubtedly, psychologists will face roadblocks in their advocacy work. Moreover, change occurs at a slow pace in the policy arena. These challenges could lead to reduced motivation and a desire to abandon advocacy work altogether.

THE SLOW PACE OF PROGRESS

Certain forms of advocacy work will require psychologists to invest substantial time and effort at each phase on a given project. The outcomes of each advocacy initiative can be uncertain, and a psychologist may determine that changes in their approach are required well after they have invested significant time and mental resources in developing a previous strategy.

MAINTAINING INTEGRITY

Psychologists can face pressure from decision-makers and/or advocacy partners to engage in misleading, dishonest, or immoral behaviors (e.g., altering or oversimplifying scientific data).

WORKLOAD

In advocacy work, change often comes after a series of coordinated efforts. Psychologists will likely be required to complete several tasks in pursuit of a single advocacy goal. Given that advocacy work is typically a service-oriented task for which psychologists are unpaid, the substantial workload required to produce change may be challenging.

TIME PRESSURE

At certain stages in the advocacy process,

psychologists may be required to work under the pressure of tight deadlines.

LACK OF INCENTIVES

Advocacy work is typically unpaid. Instead, psychologists choose to pursue advocacy efforts due to personal and/or professional values, needs, and background experiences. The lack of incentives coupled with the challenging nature of advocacy work can exacerbate the level of difficulty experienced by psychologists who are engaged in advocacy work.

External Challenges

TIME DEMANDS AND PROFESSIONAL EXPECTATIONS

Psychologists choose a variety of settings in which to practice their skills. Regardless of their work setting, the demand for psychologists' skills and knowledge is high. This demand can result in external and internal pressures to work hours that far exceed the standard 40-hour work week. Often, advocacy may not be seen as an integral part of a psychologist's work by their organization. Thus, it may be difficult for the psychologist to create or advocate for time in their schedule to address such issues, even if the issues are central to the well-being of their clients, research interests, or goals of the organization.

STRESSFUL WORK CONDITIONS

Common work-related stressors include low salaries, excessive workloads, few opportunities for growth or advancement, work that is mundane, lack of social

support, limited control over job-related decisions, sense of isolation, and conflicting demands or unclear performance expectations (American Psychological Association, n.d.). Stressful work environments, in the absence of effective stress management techniques, can negatively impact overall health and wellness. Further, if the psychologist's advocacy challenges the systems in which they work, there may be a psychological and social tension in their relationships with co-workers and the organization.

FAMILY ROLES AND RESPONSIBILITIES

Throughout various stages in their careers, psychologists play roles as family members. These roles often include caring for dependent relatives and children, some of whom may be ill or have special needs. Because advocacy often takes place outside of normal work duties or hours, balancing family needs with activism and advocacy can be difficult. Attending community meetings and participating in events may require evenings and weekend hours.

ORGANIZATIONAL POLITICS AND REPERCUSSIONS

Engagement in advocacy efforts that: (1) are not valued by the organization, or (2) aim to change the organizational culture may be met with implicit and explicit resistance. Psychologists engaged in such efforts may find that their advocacy work impacts tenure and promotion outcomes or they may be labeled a whistleblower within their organization. Though many organizations have policies and procedures that protect whistleblowers from workplace

retaliation, psychologists engaged in advocacy work may experience adverse effects.

POWER

Advocacy work may require psychologists to negotiate or otherwise contend with powerful opposition groups and challenging power dynamics within institutional or government settings.

How to Sustain

PRIORITIZATION

Given the multiple competing career demands that psychologists face, they may find it beneficial to prioritize. Prioritization involves determining the level of importance or urgency of advocacy-related activities and approaching tasks in order of importance or urgency. Another key element of prioritization is acceptance of human limitations and understanding that items lower on the priority list may remain undone for some time.

BOUNDARY SETTING

Setting boundaries is an individualized process that involves developing clear limits for one's involvement in advocacy activities in the service of preserving overall health and well-being. Psychologists may wish to set boundaries regarding the amount of time they will dedicate to advocacy work, their level of engagement in advocacy work (e.g., responding to electronic advocacy alerts vs. meeting in person with government officials to discuss a policy concern), or the types of issues they will advocate on behalf of.

SELF-COMPASSION

Self-compassion is defined as caring for oneself in the face of difficulty or perceived inadequacy. Self-compassion has three distinct components: self-kindness (vs. self-judgement), mindfulness (vs. over-identification), and common humanity (vs. isolation). Psychologists who face hardships or perceived failure while engaging in advocacy work may find it beneficial to acknowledge the pain of defeat and offer themselves non-judgmental understanding rather than criticizing themselves or minimizing or avoiding their emotional reactions. A self-compassionate stance also involves acknowledging that failure, feelings of inadequacy, and challenges are a common experience for everyone involved in advocacy work, rather than an isolated experience that others cannot identify with. Finally, self-compassion involves acknowledging unpleasant emotions that arise during advocacy work while not being engulfed by them or losing perspective of the temporary fluid nature of emotion states. For a more comprehensive explanation of self-compassion, psychologists may wish to read Neff (2003).

APPROPRIATE GOALS AND EXPECTATIONS

Advocacy work occurs slowly and in small steps. One's current advocacy project does not need to solve all problems, nor the entirety of a single problem. Recognize that a small policy change - even if it is not entirely satisfactory - can make a significant difference (e.g., a psychologist who advocates for the single payer system can find solace in the fact that making health

insurance more affordable is a small step that helps many).

RADICAL HEALING

Radical healing has been defined by Neville (2017) as, “the policies, actions, and practices which aid individuals and their groups to live out their full potential in societies with a history of racial oppression” (p. 7). Radical healing is a proactive response to injustice that involves collective resistance, critical consciousness, ancestral self-knowledge, hope for justice, and emotional and social support. Psychologists, particularly those from historically marginalized groups, may find it beneficial to express their desire for advocacy-related outcomes (e.g., liberation, freedom, or justice for specific marginalized groups) through outlets other than their advocacy efforts. From a radical healing perspective, psychologists may receive validation and support for their advocacy work through sharing ideas and envisioning future possibilities with like-minded individuals, engaging in behavioral and psychological resistance of oppressive acts (e.g., social action and activism), and taking steps to foster a sense of connection between themselves and the communities they advocate with. For a more comprehensive explanation of radical healing, psychologists may wish to read French and colleagues (2019).

ETHICAL CONSIDERATIONS

The image features a bold, abstract graphic design. The background is split into yellow and dark teal sections. A large, stylized teal shape, resembling a thick, rounded letter 'E' or a complex geometric form, is the central focus. The text 'ETHICAL CONSIDERATIONS' is printed in a bold, black, sans-serif font across the top yellow section.

ETHICAL CONSIDERATIONS

Psychologists engaged in advocacy work may encounter ethical dilemmas. It is imperative that ethical issues are considered and promptly addressed throughout the advocacy process. Psychologists are encouraged to consult APA's Ethical Principles of Psychologists and Code of Conduct. Psychologists may also refer to ethical decision-making models (e.g., Barnett & Johnson, 2008; Knapp & VanderCreek, 2012) in navigating ethical concerns related to advocacy. Below, we describe a few ethical issues that psychologists might encounter in their advocacy efforts and suggest strategies for addressing ethical issues that arise in the context of advocacy work.

MULTIPLE RELATIONSHIPS

Psychologists may encounter clients while engaged in community advocacy work. For example, psychologists and clients may co-advocate within the same community organization. When psychologists discover that they are working alongside people who are also their clientele, it may be helpful to have a conversation early in the therapeutic relationship to clarify roles and limits of confidentiality when their roles overlap.

PRIORITIES OF EMPLOYER VS. THE FIELD OF PSYCHOLOGY

Psychologists may find themselves advocating for issues that are not directly beneficial

to the organization in which they are employed. Alternatively, psychologists may be working within an institution in which advocating for change conflicts with the organization's typical process for bringing about change. Because the organization has its own process, the psychologist's efforts to establish new practices may not be well received.

RESPECT FOR DIFFERING VIEWPOINTS

The clients, students, and research participants whom psychologists serve in their work may hold values and perspectives that conflict with the psychologist's advocacy-related work. For example, a psychologist who is advocating for Medicaid eligibility for all Americans, may be supervising a student who does not believe in government supported health care. The psychologist in this situation may face the challenge of being respectful of differing viewpoints while, at the same time, persisting in advocacy efforts around this issue.

PUBLIC IMAGE AND REPUTATION

Psychologists who publicly share their activism (e.g., through social media outlets, blogs, or media interviews) should anticipate that their employer and the individuals whom they interact with in their work may become aware of their advocacy efforts. Knowledge of the psychologist's advocacy work and values may create dynamics that the psychologist is unaware of. For example, the psychologist's employer, students, clients or research participants may develop unspoken perceptions of the psychologist based on the psychologist's advocacy work.

BALANCING ADVOCACY WORK WITH JOB RESPONSIBILITIES

Psychologists may find that their advocacy work takes time away from other work responsibilities. It is important that psychologists honor the terms of their job responsibilities by setting clear boundaries around when to engage in advocacy. When engaging in advocacy as an individual, psychologists should make it clear that they are not acting/speaking on behalf of their institution, but rather, as an individual citizen.

RESPECTING CONFIDENTIALITY

Personal impact stories can be extremely powerful in communicating the need for community level change. However, psychologists must be sure to respect the boundaries of a client, research participant, or community even when their story could be impactful in advocacy. If a psychologist wishes to use personal statements by or images of individuals and community groups in their advocacy work, they are encouraged to obtain informed consent and ensure confidentiality of community members, when appropriate.

EXPLOITATION

When advocating on behalf of marginalized groups, psychologists are encouraged to be thoughtful about not taking advantage of or benefiting professionally from the plight of marginalized communities without offering them support, services, and/or resources.

CONCLUSION

The image features a background split into two shades of teal. A dark blue, rounded rectangular shape is positioned in the center. Overlaid on this are several thick orange lines that form a complex, circuit-like pattern. One line starts at the top left, curves right, then down, then right again, and finally down to the bottom right. Another line starts from the left edge, goes right, then curves down and right. A third line starts from the bottom left, goes right, then curves up and right. The overall aesthetic is modern and technical.

CONCLUSION

Our goal in developing this toolkit was to provide psychologists with evidence-based, high quality strategies for engaging in advocacy at the local and state levels.

Psychologists have long understood the impact of social issues on the health and well-being of citizens and the communities in which they reside (e.g., the scope of discrimination and its negative influence on mental health, stress, and well-being). We hope that this document helps guide both novice and seasoned psychologists in moving their work beyond individual level foci and towards interventions that target systemic, social justice issues at the local and state levels.

After reading this toolkit, we hope that you feel more empowered and knowledgeable about the policy making process, recognize how to apply skills that you already have as a psychologist to advocacy work, and have identified ways to become involved in advocacy, steps to consider when becoming involved, and the various methods available to psychologists for engaging in advocacy or policy change. We recognize that advocacy work can sometimes require a great deal of personal and emotional effort and that it can sometimes be very challenging. Therefore, we have outlined ways to take care of yourself as you face some of the internal and external challenges encountered when engaged in advocacy work. Last, but certainly not least, we are

aware that ethical issues and dilemmas may emerge for psychologists who are engaged in advocacy work. We have described some of the ethical issues that psychologists might encounter and have suggested strategies for addressing these issues if and/or when they arise.

Many of us engage in advocacy work because we want to make a difference. We hope that the tools included in the toolkit will prepare you for highly rewarding advocacy experiences.

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57 References

60 Web Addresses for Hyperlinks

62 Additional Electronic Resources

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WEB ADDRESSES FOR HYPERLINKS

1. <https://www.apa.org/advocacy/guide/federal-guide.pdf>
2. https://cpa.ca/documents/advocacy_toc.htm
3. https://www.unicef.org/evaluation/files/Advocacy_Toolkit.pdf
4. https://www.unicef.org/evaluation/files/Advocacy_Toolkit_Companion.pdf
5. <https://www.aap.org/en-us/advocacy-and-policy/stateadvocacy/Documents/AdvocacyGuide.pdf>
6. <https://ctb.ku.edu/en>
7. <https://www.law.cornell.edu/supct/html/07-1428.ZO.html>
8. <https://www.apa.org/science/leadership/students/>
9. <http://campusambassador.apa.org/>
10. <https://www.apa.org/about/apa/organizations/associations>
11. <https://www.congress.gov/state-legislature-websites>
12. <https://www.usa.gov/elected-officials>
13. <https://www.in.gov/gov/files/BillintoLaw.pdf>
14. <https://www.ca-ilg.org/local-government-basics>
15. https://www.evalpartners.org/sites/default/files/toolkit/q2/q2_guidance.pdf
16. <https://www.usa.gov/elected-officials>
17. <https://familiesusa.org/product/how-set-meeting-your-member-congress>
18. <https://results.org/resources/working-with-congress-activist-milestone-1/>
19. <https://results.org/resources/working-with-congress-activist-milestone-2/>
20. <https://results.org/resources/working-with-congress-activist-milestone-3/>
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25. <https://ctb.ku.edu/en/creating-and-maintaining-partnerships>
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27. <https://www.spssi.org/index.cfm?fuseaction=Page.ViewPage&pageId=1698>
28. <https://writingcenter.unc.edu/policy-briefs/>

29. https://wwa.colorado.edu/publications/reports/usable_research_guide.pdf
30. <https://fyi.extension.wisc.edu/programdevelopment/>
31. <https://ctb.ku.edu/en/advocating-change>
32. <https://www.apa.org/monitor/2018/02/write-op-ed>
33. <https://results.org/resources/working-with-the-media-activist-milestone-1/>
34. <https://helenneville1.wixsite.com/website-1>
35. <https://ctb.ku.edu/en/table-of-contents/participation/promoting-interest/press-releases/main>
36. https://www.bolderadvocacy.org/wp-content/uploads/2018/06/Tips_on_Using_Social_Media_for_Advocacy.pdf
37. https://www.gjcpc.org/pdfs/ENScott%20_%20Maryman%20-%20Social%20media%20to%20complement%20advocacy%20FINAL-FORMATTED.pdf
38. <https://www.apa.org/apags/resources/advocacy/social-media-advocacy.pdf>
39. <https://www.sciencemag.org/careers/2016/11/scientists-ride-podcasting-wave>
40. <https://www.thepodcasthost.com/planning/how-to-start-a-podcast/>
41. <https://results.org/resources/working-with-the-media-activist-milestone-3/>
42. <http://www.cihr-irsc.gc.ca/e/2169.html>
43. <http://www.gdrc.org/ngo/media/index.html>
44. <https://www.sciencemag.org/careers/2008/09/your-research-headlines-dealing-media>
45. <https://www.apa.org/pubs/authors/working-with-media>

ADDITIONAL ELECTRONIC RESOURCES

ADVOCACY TOOLS

<https://www.apa.org/advocacy/guide/federal-guide.pdf>

https://www.who.int/mental_health/policy/services/1_advocacy_WEB_07.pdf

<https://www.nami.org/Find-Support/NAMI-Programs/NAMI-Smarts-for-Advocacy>

<https://ctb.ku.edu/en>

https://www.unicef.org/cbsc/files/Advocacy_Toolkit.pdf

https://www.unicef.org/evaluation/files/Advocacy_Toolkit_Companion.pdf

<https://www.nasn.org/advocacy/advocacy-skill-building>

<https://www.aap.org/en-us/advocacy-and-policy/state-advocacy/Documents/AdvocacyGuide.pdf>

AMERICAN PSYCHOLOGICAL ASSOCIATION AND DIVISIONS

<https://www.apa.org/advocacy/>

<https://www.apadivisions.org/division-31/news-events/outstanding-leaders>

<http://www.scra27.org/resources/webinars/>

<https://www.spssi.org/index.cfm?fuseaction=Page.ViewPage&pageId=1698>

[Federal Legislative Process:](#)

<https://www.house.gov/the-house-explained/the-legislative-process>

<https://www.youtube.com/watch?v=FFroMQIKiag>

FELLOWSHIPS

<https://www.apa.org/about/awards/congress-fellow>

NATIONAL AND STATE LEVEL CIVIL RIGHTS ORGANIZATIONS

<https://www.civilrightsproject.ucla.edu/resources/civil-rights-organizations>

STATE LEGISLATIVE PROCESS

<http://www.ncsl.org/research/about-state-legislatures/legislative-process.aspx>

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