Advanced practice nursing: Shaping health through policy

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Abstract

Purpose: To highlight the importance of advanced practice nurses (APNs) becoming politically engaged as key to promoting the healthcare interests of patients, communities and the profession and to offer specific strategies on how to become politically competent.


Conclusions: APNs must come to see political engagement as a professional obligation and health policy as something that they can shape rather than something that happens to them.

Implications for practice: The overall goal of healthcare reform is the provision of quality, safe and cost-effective healthcare for all Americans. APNs are graduate prepared clinicians that focus on health and illness management and are strategically positioned to lead the way in shaping and implementing health policy priorities.

Why advocacy and political engagement?

As professionals, nurse practitioners (NPs) advocate for their role and profession, as well as the improvement of social and healthcare policies on behalf of individuals. Moreover, when illness begins to interfere with a patient’s independence and ability to make choices, NPs often advocate on their patients’ behalf for healthcare resources. Unfortunately, the value and impact of NP-delivered healthcare services are often hidden. One example of NP invisibility includes billing Medicare for NP-delivered healthcare services submitted as incident-to the professional services of physicians. If eligible and billed as incident-to, NP impact is invisible because services provided and the billing of those services are not accessible to others examining NP value, quality, safety, and overall contribution. Instead, this practice is encouraged by the healthcare reimbursement structure because if NP’s billed directly for their services, only 85% of the physician fee would be collected; whereas if billed under a physician’s Provider Identification Number (PIN), the physician practice will recoup 100% of the physician reimbursement fee (Centers for Medicare & Medicaid, 2014). More and more, our healthcare system depends on NPs. Incident-to billing is one way NP contributions are masked. During this era of healthcare reform, the impact of NP-delivered health care on quality, safety, and costs cannot remain invisible. Advocacy requires commitment and presence. Ownership of practice must reside with NP professionals, therefore, NPs must become politically engaged to help craft and shape the changes needed to highlight the contribution of NPs in the delivery of quality, safe, and cost-effective services. Limitations on NP scope of practice and healthcare delivery negatively impacts communities in that needed services cannot be provided by highly educated and trained NPs with restricted state practice acts. This, then, is a call to action!

Political competency

Although very busy, all NPs can engage in political action in some way. Political engagement necessitates that NPs become politically competent. Political competency comprises putting to use various strategies, perspectives, and values necessary for successful political engagement.
(Ridenour & Trautman, 2009; Warner, 2003). While getting involved is the first step to becoming politically competent, NPs should remember that compromise, commitment, and time go hand-in-hand when working with the legislative process; recognizing that small victories must be celebrated along the way. In fact, it may take many attempts as well as years to get legislation passed. While examining the lived experiences of six expert nurse activists, Warner (2003) noted that “…stories were not all of victory. There were stories of electoral loss, a troubled relationship with the press…defeated legislation, and funding difficulties” (p. 142). Inherent in political competence is the quality of perseverance. The difficult and challenging work of the NP political advocate is to educate and demonstrate to powerful policymakers that supporting and advancing policies that promote better health and health care is in the best interest of the larger community.

A health policy toolkit: Becoming politically competent

Learning how to access and utilize health policy resources will serve to further develop the NP toward greater political competence. Political competence is essential if NPs desire to bring their expertise and experience to policy tables and discussions. The NP voice is necessary in the dialog to transform our country’s healthcare system, secure the NPs role in healthcare delivery, and to have an influence on determinants of health. Above and beyond the many resources, NPs should not underestimate the important skills of communication, active listening, consensus and team building, and strategic planning as critical to becoming politically effective (See Table 1) (Warner, 2003). At all levels of policy engagement, messaging is key!

Developing an “Ask”

Selecting a legislator to communicate with is a strategic decision. Prior to communicating, the NP should do her/his homework and become familiar with policymakers’ interests and positions. The purpose for initiating communication is to inform legislators on an issue and ask legislators and their staff member to do something about the issue; for example, to sign on as a co-sponsor to a piece of legislation. Developing an effective Ask is critical! Just as an NP would anticipate that a patient with an infection will be asking for an antibiotic, the Ask is the so what that the legislator or legislative staff member will be listening for. An effective Ask should be of interest to the legislator, and is something that the legislator is able to act on (Gurdin & Milder, 2012). Examples include asking the legislator to sign on as a sponsor for a bill, sending a letter of support, and contacting other committee members or party leadership. Relating how the bill can support their political interests can help the NP be successful in the Ask, identifying how the bill may help with their community or group of interest (e.g., Veterans).

Contacting a legislator is an important opportunity to express how a given issue impacts the NP’s ability to provide care to patients and community. Even though

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professional organizations, such as the American Association of Nurse Practitioners (AANP), have health policy offices that often include lobbyists, hearing from constituents has a much greater impact on a legislator. In fact, lawmakers expect constituents to visit and discuss relevant issues; their offices are staffed for this purpose. When a given issue is identified, the NP should first identify individuals who are in the position of affecting change. Sometimes this may be at the local or state level and so communicating with local or state officials may be the most effective early step. Other issues may be broader, necessitating the NP to contact U.S. Senators and Representatives. The best way to make initial contact with any legislator is through e-mail and telephone. Contacting staff members can also be a direct and productive way of engaging policymakers. Staffers are often policy experts who cover a variety of issues and legislative topics, and serve as an advisor to policymakers. For federal officials, direct communication can be obtained through their official websites (U.S. House of Representatives, 2014; U.S. Senate, 2014). Regular U.S. mail is not always an effective means of communication because of the requirement that all mail be decontaminated prior to delivery. As a result, a letter may take weeks to arrive at a selected office, and when it does finally arrive, it may be illegible. On the other hand, some legislators are very responsive to a real letter that is sent to their local state or district office rather than their office in Washington, DC.

When calling the policymaker’s office, the NP should be sure to inquire about which staff members cover which issues. Once the NP has obtained and verified the legislative staff member’s name and correct spelling, the NP should send an e-mail introducing themselves, the policy issue, and request a meeting with a specific time frame. It is important that the NP be precise and concise with e-mail communication. House e-mail addresses should be addressed to: firstname.lastname@mail.house.gov, and Senate e-mail addresses to: firstname.lastname@senator’slastname.senate.gov. When sending an e-mail, the NP should be sure to attach an electronic copy of any information that supports the health policy issue.

Letter writing through the Congressional website is also an effective way to contact legislators. AANP and other professional organizations have advocacy centers, which have prepared prescripted templates on specific issues. These prescripted templates can be developed into a letter and are an easy way to ensure that the NP’s voice is heard. Although writing a personal letter requires more time and reflection, it may lead to more personal communication. Even when using a prescribed template, NPs should remember to personalize their letter by adding their own story emphasizing how the given issue affects them, their patients, and their community.

The one-pager

We all live busy lives! Legislators and legislative staff members are no different. They, too, are pulled in many different directions, facing time constraints, deadlines, and commitments. In fact, when an NP requests a meeting with a legislator, it is not unusual to be scheduled to meet instead with a legislative staff member. Make sure to treat legislative staff members similar to legislators. Legislative staff members are highly influential. They serve as advisors to the legislator, closely monitor research and issues, serve as gatekeepers, read and respond to constituent mail, meet with constituents, and often maintain the legislator’s schedule (Research!America, 2013).

Preparing a One-Pager prior to a meeting is critical (Fig. 1). It not only serves as a means for helping legislators and their staff understand the policy issue in a succinct and professional manner, but also provides a means for the NP to be contacted at a later date. Further, the One-Pager will serve as a quick reference document, which the legislative staff member can then later share with their boss and other staff members. Talking points, including information about the NP’s target population, community partners, and why the NP’s work is critical to addressing the needs of constituents and communities, are also important and should be included in discussions as well as included in the NPs One-Pager.
When preparing a One-Pager, the NP should (a) include a letterhead or logo (being careful to not use work or professional letterhead without the permission of the organization); (b) use a variety of headings, fonts, bullets, and visuals (creating a professional document that is both appealing and a user-friendly document); (c) include the date, contact information, and identify any partnerships; and (d) include clear and concise language, limit the length of sentences to 9–12 words, and include facts and statistics to define successes and findings (Wenk & Ryan, 2013). Professional organizations, such as the AANP, tailor and make available to members One-Pagers, which address specific NP issues, message points, and actions that have been identified as important to helping move a given NP issue forward (AANP, 2014b). Using these resources will help NPs with consistent messaging on a given issue.

**Legislative and Congressional visits**

Visiting a legislator is an effective strategy as it affords the NP the opportunity to build bridges of respect and trust. Building these relationships can help open doors when NPs need them. In preparation for the visit, the NP should mentally prepare herself/himself for anything! Since 9/11, security in legislative and government buildings has become much more of a concern. On the day of the visit, the NP should make sure to allow plenty of time to get through security. While much planning has been done to prepare, the visit itself will probably last only 10–20 min. Although the NP anticipates meeting with the legislator in his/her chambers, it is not unheard of to instead meet with a legislative staff member in a hallway outside of the legislator’s office suite, or even while walking with the legislator to the floor of the House or Senate. It is very important that she/he be prepared to deliver an Elevator Pitch. During this 30–45 second speech, the NP must hit all of the main points regarding the health policy issue quickly and effectively. Included in the Elevator Pitch should be specifics about the NP’s professional role and challenges and successes. Talking points from the already developed One-Pager will serve as a guide. It would also be important for the NP to link connections to the legislator’s respective state/district and his/her personal interests to the health policy issue. The meeting should end with the NP offering to leave a business card. NPs should not become discouraged at whatever events constitute the legislative visit. The NP’s issues and concerns will be heard.

While visiting legislators in Washington, DC is a great way to discuss policy issues, most legislators also have local offices in their respective states. It may be more convenient to schedule meetings during periods of recess, when legislators are home in their respective states/districts. There are additional benefits to making a home visit. Visits in home states/districts tend to be more hands-on, often last for more than one hour, and lend themselves to greater involvement by the legislative member because local impact and community involvement is highlighted among constituents. Further, it is an opportunity for the NP to show the legislative member close and upfront their program in action (Mioduski & Souders, 2014). Attending town hall meetings, open forums, and school board meetings further affords the NP the opportunity to build relationships. The following pearls are designed to help the NP plan and conduct a productive meeting, and establish lasting relationships with policymakers.

**Making an appointment.** The NP should request the meeting as soon as an issue is identified for which the NP would like to have an in-person discussion. It is important to verify the appointment a day or two ahead of time because of rapidly changing priorities and schedules. When calling or e-mailing the office, ask for the scheduler’s name and work with them directly. Send the scheduler complete contact information. The meeting request should clearly state the topic or issue to be discussed. This information will be helpful for the scheduler when determining the appropriate legislative staff member, should the legislator not be available. It is important to follow-up with an e-mail and phone call to confirm appointments (Research!America, 2013).

**Having a successful meeting.** It is important for the NP to work to ensure a productive meeting. When the NP meets with the legislator and/or legislative staff member, there are certain things to remember. First of all, they must do their homework. Read about the legislator before the meeting. Be prompt, be prepared to wait if necessary, and anticipate a short meeting. The NP should begin the meeting with a thank you, acknowledging the legislator’s service. Remember, good messages are concise, clear, and memorable. The NP should identify the legislator’s knowledge of NPs. Many will have had contact with NPs in the past, some will not. Clearly communicate the Ask! Throughout the visit, it is important to be brief while making sure to provide important background information. Remember, the One-Pager will serve to reinforce the Ask. Speak professionally and personalize the message. It is important that the NP personalize the given issue to themselves and their community. The NP should include a story about how the issue affects their patients and what the consequences will be if the change does (or does not) occur. Personal meetings provide an opportunity to express how an issue impacts one’s ability to provide care to their patients and the community. During the homework and preparation phases, the NP may have considered extending an invitation for the legislator and
legislative staff team to visit their place of work. NPs may invite the legislator to visit their practice where he/she can see, firsthand, the nature of the NP’s work. This is especially important if the NP works at a federally qualified clinic, rural clinic, or an area greatly impacted with access to care issues. NPs should not forget to leave business cards and materials (such as research articles, news releases, and any pamphlets or brochures) describing their work. This will help the legislator or legislative staff member remember the focus of the visit. After the meeting, it is important for the NP to send thank you notes; these should be sent via e-mail. Thank you notes should reinforce the Ask. Along with thank you notes, the NP should send any other materials that may be useful to the legislator and legislative staff members (Research!America, 2013).

Continued communication builds relationships. The better the relationship, the more the person will listen. NPs can use social media to keep in touch with their legislators. They can friend their legislators on Facebook as well as follow them via Twitter. By responding to their posts, the legislator and their staff members will have the opportunity to get to know the NP. NPs should offer to help legislators with questions on healthcare issues. If the legislator has a healthcare advisory group, the NP can volunteer to be a member.

NPs should be visible and available to assist with educating policymakers. Remember that the NP’s goal is to impart expert knowledge for the purpose of influencing determinants of health, advocating for patients, contributing to the transformation of our healthcare system, and positioning NP practice at the forefront of healthcare delivery.

What not to do during a meeting. While there are things that the NP must remember to do during a meeting with a legislator or legislative staff member, there are also things that they must not do. Never discuss campaign contributions or donations; it is forbidden to discuss in legislative offices. Also, while some questions from legislators and positions may be displeasing, NPs should remain calm in their conversations and should never react in an angry manner. Finally, if an NP does not know the answer to a question, they should be honest while making sure to get back to the individual with the information.

Contributing and volunteering

Contributing money is an important health policy resource which, historically, NPs have not fully exercised. The primary reason to donate to a campaign is to support political activities and policymakers with similar ideas and a shared vision. These individuals then represent NPs and their patients when voting on issues. Even small donations of $10–$20 will usually ensure that an NP’s name is added to a list of donors. In addition to donating money, volunteering during a campaign and attending fundraisers can also provide direct access to legislative candidates, incumbent legislators, and legislative staff members. Access allows for additional opportunities to discuss policy issues as well as offer expert NP services.

Advocacy and political engagement: Beyond the state delegation

While getting to know the NP’s state delegation is important, it is even more important to become familiar with who the members and staff of the various Federal Committees Jurisdiction and the Committees on Appropriations are, or at least the staff of the members assigned to those committees. Federal Committee Chairs and members are powerful in that they are at the center of policy making, are directly involved in all decision making regarding the demise or approval of a bill, are responsible for drafting legislation, and determine and authorize funding and funding levels (Table 2) (Ridenour & Santa Anna, 2012). It is important to remember that even though legislation may be passed through a given committee, not funding or underfunding the legislation can be fatal. Therefore, with regard to both legislative and regulatory processes, this is where the rubber hits the road. Each committee is led by a Chair along with either Senators or Representatives who serve as standing members. NPs should work together with the Government Relations staff of their professional organizations to help influence legislative and regulatory processes. Together, they should get to know the members of these committees. As is the case with state delegations, members and staff of these committees are very busy. Prior to contacting committee members, it is critical to be informed about health policy issues currently under consideration at all levels of government. It is essential that NPs, together with their organization’s Government Relations staff, present a consistent message or Ask. Further, being informed helps to avoid wasting policymakers’ and staff members’ time. Sharing NP expertise about health care with members of the Federal Committees Jurisdiction and the Committees on Appropriations is very important because members often look to NPs to help inform their understanding of healthcare issues. In fact, it would not be uncommon for NPs and their Government Relations staff to be involved in crafting language to be included in a bill or legislation. Another way that NPs interested in health policy may work closely with their organization’s Government Relations staff and U.S. Congressional committee members and staff is through...
participation in a Health Policy Fellowship. Fellowships are offered by professional organizations and provide NPs the opportunity to experience firsthand policy in the making at the federal level. The AANP (AANP, 2014a) and the Robert Wood Johnson Foundation (RWJF2014) offer such opportunities and application is competitive.

**Lobbying**

The purpose of lobbying is to influence and/or persuade another (Milstead, 2013). Although most NPs will primarily be engaged in political activities related to advocacy, it is essential that they be aware of the many regulations and laws related to lobbying as participating in lobbying activities may have both personal and professional implications.

**The slippery slope**

NPs should be familiar with the tax status of an organization that they are affiliated with and they should become familiar with restrictions regarding participation and engagement in lobbying and political activities (Wenk, Mattison, & Sedgwick, 2013). Tax status and other laws designate the amount of money that an organization may spend as well as the type of lobbying activities that employees may engage in. For example, a 501(c)(3) public charity is legally limited to spending a specified amount of monetary resources and time on lobbying activities. Unlike 501(c)(3) public charities, 501(c)(3) private foundations are not allowed to use money for the purpose of lobbying (Gurdin & Milder, 2012; RWJF, 2011). Above all, NPs should use good judgment in determining whether a particular activity,
communication, and conversation are appropriate under any given circumstance.

**What is direct lobbying?**

Direct lobbying constitutes direct communication with a legislator or a legislative staff member that refers to pending or potential legislation, and reflects a view on such legislation. Direct communication may be in the form of face-to-face meetings, e-mails, phone calls, and letters. Pending or potential legislation includes bills that have been introduced, legislative proposals that have yet to be introduced, appropriation bills, and resolutions. Communication that reflects a view on legislation includes endorsement or opposition of legislation, urging legislators to fix a problem in a bill, and explaining a bill’s negative consequences (Wenk et al., 2013).

**What is grassroots lobbying?**

Grassroots lobbying is any communication with the general public that refers to specific legislation and includes a *Call to Action*. A *Call to Action* may include asking an individual/s to contact a legislator, identifying an individual’s legislator, providing the contact information for a legislator, identifying a legislator’s position on legislation, and providing a means (e.g., e-mail, petition) for an individual to contact a legislator (Wenk et al., 2013).

**Which activities are not considered lobbying?**

There are many activities that are not considered lobbying. Discussing broad social issues without reference to specific legislation and communicating about nonpartisan policies is not considered lobbying. Further, developing and distributing in-depth nonpartisan analysis and research materials that may make reference to legislation and reflect a view are not considered lobbying as long as they include a fair and objective discussion of the facts allowing the reader to form an independent opinion, are broadly distributed to individuals on both sides of an issue, and do not include a *Call to Action* (Gurdin & Milder, 2012). Tweets and posts via social media may or may not be considered lobbying (Fig. 2).

**Political action committees**

Political action committees (PACs) are a type of lobbying. A PAC collects money from its members for the purpose of making donations to political candidates. The *Federal Election Campaign Act* defines the rules under which a PAC can operate, which include such things as the limitation that individuals can contribute to a federal PAC within a year ($5000), and that PACs can only solicit funds from members of the organization it is affiliated with. PACs provide a way for contributors to become involved in and influence the political process. The AANP-PAC brings together AANP members for effective political action to strengthen the NP federal voice. The AANP-PAC allows the members of AANP to have a voice in the political process by helping to elect pro-NP legislators.

AANP members have an opportunity to donate online to the AANP-PAC (AANP, 2014c). These donations are used to support political candidates who share the purposes of AANP to promote NP practice. While individuals can provide support to legislators who share their views by providing volunteer services to a candidate or party, making individual contributions or participation in an AANP-PAC fundraiser raises awareness at the federal level as to the political will of AANP and all NPs as a large and powerful constituency. NPs are encouraged to contact their national organizations for opportunities for PAC participation.

**Organizing a site visit**

When strategically organizing a site visit, the NP should first determine which policymakers and stakeholders to invite. Prior to inviting a policymaker for a site visit, the NP should first work with her/his employer. There may be some sites that for various reasons would not permit such a visit or where special or added clearance may be required. During the planning stages, the NP should...
determine when and where the visit will occur, whether or not the visit will be a one-time or ongoing event, and determine activities to be included. Several possible dates for the visit should be offered. Further, NPs should strategically plan the message that they want the policymaker to hear, as well as determine who they would like the policymaker to speak with. During the visit, it would be very important to acknowledge funders, leaders, and other important individuals. Similar to legislative visits, policymakers will be looking for the Ask. Specifically, they will be looking for information regarding how they can help. It is important that NPs be confident and comfortable delivering the Ask. After the site visit, thank you notes and photos should be sent to the legislator’s office. Following up with legislators and their staff is an important step when building working relationships (Peters, Woolley, & Zimmerman, 2013).

Inviting legislators to the NP’s work place or community is not only a great way for the NP to call attention to a policy issue, but also serves as an opportunity for media coverage. This is a critical aspect of planning a site visit. For example, if appropriate, a photographer could be hired and the media apprised of the event. Additionally, the NP should plan and work in conjunction with the policymaker’s press office. It is important to first clear all plans for media coverage with the legislator’s office, and also to work with the legislative staff as they may already have resources in place that may be helpful. Media attention creates an opportunity to call attention to the issue and also affords the legislator exposure among constituents.

The media as a means of gaining policymaker support

NPs are wired for sound! They receive news over cell phones, televisions, iPads, and various other technologies. Learning how to leverage the media to gain policymaker support is another policy strategy that NPs may use to move their issues, concerns, and interests. When considering how to leverage the media, NPs must first identify their audience and determine if and how their issue is newsworthy. Once the audience is identified, NPs need to determine how the issue is to be leveraged; for example, breaking news, a feature story, branding, and an Op-Ed (Burness, Casey, & Mahoney, 2012). Networking and building working relationships with reporters helps get the word out. Once the NP has arranged for media coverage, it is important to make sure that legislators and staff members, stakeholders, and other community leaders are aware and involved. The AANP Press Room has specific information sheets to help NPs engage in the media (AANP, 2014d). Information sheets provide added resources for a given NP-focused brief and highlight important points to include when leveraging the media to gain policymaker support.

Social media as a strategy

Ahlvqvist, Back, Halonen, and Heinonen (2008) described social media as social interaction among individuals where information and ideas are created, shared, and exchanged in virtual communities and networks. Social media is indeed a great way to establish a presence for the purpose of moving a policy issue. Prior to developing a social media presence, NP associations should develop a social media policy. Creating a social media policy helps define goals and serves to keep all focused on the goals. Today, the most popular social media sites include Facebook, YouTube, and Twitter. Strategies for building social media momentum through these popular media sites may include tweeting several times a day, posting several Facebook updates on a weekly basis, and creating and posting videos on YouTube. It is important for NPs to interact with their audience frequently via retweeting and commenting, using images and videos as often as possible, and to use tools such as Crowdbooster to schedule regular tweets and Tweetdeck for real-time tracking, organizing, and engagement (Wenk et al., 2013). NPs should identify followers and reach out to them.

Moving policy objectives through partnering

Building partnerships and working with strong coalitions are strategies that are useful when moving policy issues. Building stakeholder partnerships often results in a wider reach with an increase in credibility, more efficient use of resources, and a stronger message. One example of an organization that NP organizations can partner with is the American Academy of Nursing (AAN). The AAN, composed of over 2100 top nursing decision makers and leaders in education, management, practice, and research, serves the public and nursing profession by advancing health policy and practice through the generation, synthesis, and dissemination of nursing knowledge. Fellows of the AAN are involved in nursing initiatives that are transforming health care, leading change, and influencing policy for the ultimate purpose of improving our nation’s health (AAN, 2014). For fellows of the AAN, networking is facilitated through Expert Panels, Task Forces, and opportunities such as the Institute of Medicine/American Nurses Association/American Nurses Foundation/AAN Scholar-in-Residence program.

Partnerships and coalitions can be powerful when they serve to bring multiple stakeholders together in a coordinated effort. Coalitions often have a strong
leadership presence, a diverse membership representing the stakeholders, a clear mission and goals, diversified funding sources, content and process expertise, and a process in place for negotiating conflict (Marx, McGoldrick, & Barkley, 2013). Building stakeholder partnerships and working with strong coalitions can serve to help NPs reach their policy goals. Some of the most powerful stakeholders for NPs are often their patients.

Summary

Identifying important policy issues is both professionally and personally of interest to NPs. While there are issues that impact NP practice, such as practicing to the full extent of their education and training, others are personal to a community. Today, no NP has the time to be involved with all policy issues facing health care and clinical practice. Instead, NPs should focus on policy issues that affect their patients and practice, while at the same time support and echo the messaging of professional NP organizations. In turn, professional organizations support the NP in the message. These organizations, such as the AANP, are actively pursuing more global NP issues.

The overall goal of political engagement is to develop a longstanding relationship with policymakers and their legislative staff. Over time, this relationship grows as a result of the NP expert becoming recognized as a trusted source of nonpartisan, objective information and analysis. NPs must become engaged and demonstrate political competence. Many NPs will choose to serve in supportive roles, while others desire to implement their ideas. Whatever the chosen role, NPs need to become politically engaged for the purpose of protecting clinical practice and the healthcare interests of patients and communities. Further, NPs need to learn to become politically competent by using various health policy tools and resources for the purpose of advancing the NP healthcare agenda.

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