



**Hosting a Successful Visit With Your
Legislator:
Aging Services of California's
Grassroots Toolkit**

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Introduction

One of the most effective ways to deliver a message to legislators about the needs of long-term care providers and recipients is to provide them the opportunity to observe first-hand what goes on in your community. Aging Services of California's members provide a much needed community service. Our communities are a place where voters receive care and a place where voters work. A tour of your community will open legislators' eyes to the benefits of quality long-term services care. In addition, it will help you build and cement relationships with legislators and position you as a trusted resource on questions of long-term care issues. Here are eight easy steps for ensuring a successful visit:

- 1. Schedule Well in Advance:** With committee hearings, floor sessions, meetings, staffing issues, and other related tasks, legislators' schedules are very hectic. Be proactive and tactfully persistent. Call the legislator's district office and ask to speak with the scheduling secretary to make an appointment with the legislator when he or she will be in the district. Have in mind a time frame when you would like to schedule a visit. If possible, tie it to a theme or event (such as the opening of a new wing, a major announcement, a 100th birthday celebration or other such attention getting event). You will have a better chance of securing the meeting if you plan for a time when the legislature is out of session and the legislator is in the district (September – December). They will likely want you to submit an invitation in writing. *See Appendix A for a sample invitation letter.*
- 2. Confirm and Reconfirm:** Confirm the date, time and plans by writing to the legislator directly. Do you want the legislator to stay for lunch or dinner? If so, plan well in advance and coordinate with the legislator's staff regarding the menu. Send a copy of the confirmation letter to the district staff. Reconfirm again by phone with the legislator's scheduling secretary as the date of the meeting approaches. Ask for the name and a mobile phone contact number of the staff person that will be accompanying the legislator.
- 3. Set Your Goals and Do Your Research:** A major goal of the visit is to familiarize your legislator with your community and its mission and services so that he or she sees the organization as a credible information source. Plan to share innovative programs you use and success stories of both residents who exceed expectations and staff who have performed above and beyond the call of duty. Think about how various public policy proposals will affect the things you are sharing with the legislator and share that with them. (For example, if budget cuts will force you to eliminate special programs, first highlight the program and then point out it is in danger of being cut if the proposed budget cuts are approved.)

Review the legislator's voting history on long-term care issues. (Keep in mind the competing pressures that legislators face when casting their vote.)

Identify the clear and succinct policy message or position you want the legislator to take away from the visit. Depending upon the timing within the legislative session you may determine you want a commitment from your legislator on a specific bill or proposal. If so, ask, and try and get a specific response.

Aging Services' public policy staff can help you research background information about legislators and their voting records and positions on important issues.

4. **Plan Your Agenda and Inform Staff and Members:** Plan and rehearse a detailed agenda of what you want to cover. A visit should not exceed one hour unless the legislator has time to stay longer. Most important ... build the relationship. Offer to be a source of expertise for the legislator on long-term care issues.
 - **Map the tour** – Be very organized in the presentation of your center. Move from room to room pointing out specific information that would be informative to the candidate. Be very specific.
 - **Provide written materials** – Be prepared to give the legislator background materials about your community and on long-term care in general. *See Appendix B for a list of sample discussion points and suggested handouts.*
 - **Inform staff and residents** – Make sure staff and residents are aware of and prepared for the legislative visit. Identify competent spokespersons that can accompany the legislator on the tour, and schedule time for the legislator to sit down and have an informal chat with residents. Make this an exciting event in your community! *See attached Appendices C and D for a sample flyer and a sample newsletter ad.*
5. **Invite the Media:** A media presence serves multiple purposes. It makes the meeting more enticing for the legislator because it showcases him or her meeting with constituents and learning about the needs of providers in his or her district. In addition, a legislative visit is an opportunity to get the media into the community to showcase your community and the wonderful things happening there. Do not be discouraged, however, if media does not show-up, especially in the larger media markets. Hooking the media often takes time and persistence. *See Appendix E for a sample media advisory.*

Aging Services of California's public policy staff can help you learn how to work successfully with the media, including identifying and pitching appropriate reporters, writing media advisories and releases, and securing attendance.

6. **During the visit:** Keep to your schedule. At the same time, be prepared to be flexible ... legislators often run late. If necessary, contact the attending staff person whose name you were previously given to check on the legislator's arrival status.

During the initial introductions, ask for business cards from the legislator and any staff with them. Offer your business card, along with the cards of other staff present, to the legislator.

Be clear you understand specifically what the legislator is focusing on in his or her questions and comments. For instance, if he or she is asking questions about budgets and reimbursements, do not assume they are wondering how you manage to provide all the services you do with such a low Medi-Cal reimbursement. They may instead be looking for ideas about where services and reimbursements can be trimmed in order to shave dollars off the state deficit.

7. **Make it a Photo Opportunity:** Be sure to take pictures highlighting the visit. You will want to use the photos in a variety of ways ... newsletters, bulletin boards, post-event media releases, etc. Also, you will want to include copies of the photos in your thank you note to the legislator, and please send a set of copies to Aging Services' public policy

office.

8. **Follow Up:** If you invited media and they were unable to attend, send them a post-event media release and include a copy of one or two photos with all people properly identified and all names and titles spelled correctly. You may include a suggested caption, but be aware that the publication will likely choose to write its own.

Write to the legislator thanking them (and any staff that attended) for coming to your community. Include copies of the photos that were taken during the visit. Review the names of people (both staff and residents) the legislator met with during the visit, summarize the issues that were discussed, specify what you are asking the legislator to do as follow-up, and reiterate your offer to be a resource for him/her on long-term care issues.

Please send a copy of your letter to Aging Services of California's public policy office.

For more information or assistance planning a legislative visit contact Carrie Seifert at (916) 469-3383 or cseifert@aging.org.

Quick Tips for a Successful Visit

Prior to the Visit

To be most effective in your presentation, you must be prepared. Review timely relevant materials prepare to highlight the most important elements.

The Basics

- Be prompt and patient. Legislators' schedules are tight and frequently interrupted. Be on time, but be flexible when interruptions occur.
- Address your legislator properly.
- Be brief and to the point, mention any bill number/issue in question, and use arguments with pertinent facts for supporting or opposing the bill/issue.
- Welcome a meeting with staff if the legislator is unable to attend the meeting. Staff is often more familiar with your issue, and will provide you with invaluable access.

Definite Don'ts

- Don't give up or get angry if you can't make contact with the legislator on the first try.
- Don't become angry or hostile in discussing critical issues.
- Don't make threats – even though you might disagree with a legislator on one issue. Remember the big picture and that the relationship might be helpful on another issue in the future.
- Don't exaggerate the truth – admit you don't know but will look into the matter and get back to the legislator.
- Never discuss legislation in conjunction with financial contributions.

Follow-up

Thank your legislator for his/her time. Send a follow-up letter within a week briefly restating your concerns, and providing clarifying information if needed.

Appendix A – Sample Invitation Letter

Date

Assembly Member/State Senator Name
Mailing Address
City, State ZIP

RE: Invitation to Visit Our Community

Dear Name,

On behalf of the residents and staff of (community name) I would like to congratulate you on your winning the election for (Assembly/State Senate District #). We at (community name) look forward to working with you on issues maintaining and enhancing the quality of life in our community. Of particular interest to us is legislation affecting how to meet the needs of the frail and elderly in our society.

I would like to offer you the opportunity to tour (community name) so you may learn first-hand how long-term care communities operate and how the legislative issues you will grapple with in the Capitol impact our ability to provide quality care and housing for California's aging population.

(Community name) is representative of the many community-based, not-for-profit providers of housing and services to the aging in California, and I would like to share with you some of our areas of concern. Liability insurance crisis, the housing needs of the frail elderly, the fiscal integrity of the Medi-Cal program, and burdensome and excessive regulations, these issues all directly impact our ability to provide quality long-term care for the elderly.

(If the visit coincides with a special event in your community, put in a descriptive sentence or two.)

I will follow up this letter with a call to your district scheduling secretary to set up a mutually convenient date. Also, a long-term care fact book is enclosed for your information.

Your visit is much anticipated and greatly appreciated.

Sincerely,

Name
Title
Community name

Enc:

Appendix B – Sample List of Issues for Discussion

Quality Assurance Fee - Provider Tax

Issue: Aging Services of California represents not-for-profit providers of a continuum of services and health care to the aged population of California. Twenty five percent of our members provide skilled nursing services either in a stand-alone skilled nursing facility or as part of a continuing care retirement or a multi level community, of which a skilled nursing facility is a component.

Recommendation: Forcing CCRCs and MLRCs to pay the provider tax (aka: Quality Assurance Fee (QAF)) will simply be a tax on retirement savings. It is unfair to the residents who have saved for their own retirement to be required to pay more to subsidize Medi-Cal residents' retirement. Both the CCRC and the MLRC exemption from the QAF must be maintained.

Ensuring Equity in Temporary Relocation of Residents Due to Renovations In Continuing Care Retirement Communities

Legislative Objective: Establish law to ensure protections for residents who must relocate due to major repairs or renovations

Recommendation: Support AB 1433 (Eng & Beall) which establishes certain contract requirements in the Health & Safety Code regarding temporary relocations due to renovations or major repair.

Home and Community Based Services

Legislative Objective: To provide recommendations on how to improve access for Californians in long-term care through the use of Home and Community-Based Services (HCBS). Recent research has found that states with well-established, integrated HCBS programs had lower overall long-term care (LTC) spending growth. In contrast, states with low ratios of HCBS expenditures had higher overall LTC costs, as their institutional costs increased.

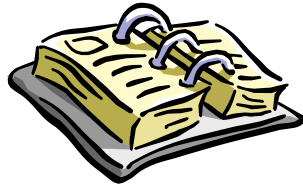
Recommendation: Although, California's budget deficit makes it difficult to consider expanding services in the short term, investments in HCBS programs would likely improve the effectiveness of the "system of care" and reduce the rate of growth by shifting more resources to community services.

Affordable Housing

Legislative Objective: Create a permanent source of state investment for the development, preservation and rehabilitation of affordable homes.

Recommendation: Create a permanent and dedicated vehicle through which the state can fund the development, preservation and rehabilitation of affordable homes. Doing so not only reduces the pressure to issue general obligation housing bonds, it presents an alternative pay-as-you-go method to fund the state's affordable housing programs.

Appendix C – Sample Flyer



Mark your calendar for a visit from Assembly Member/State Senator (Name)

WHO: Assembly Member/State Senator (Name)

WHAT: Legislator Visit

WHEN: Date
Time

WHERE: Right here in our community
Room location

This is your chance to get up close and personal with our representative to the State Assembly/Senate in Sacramento. Don't miss this opportunity to learn more about issues affecting our community and long-term care in general.

For more information, please see (Name).

See you on (date)!

Appendix D – Sample Newsletter Ad

**Don't Miss Assembly Member/State
Senator (Name)'s Visit to (Community
Name)**

(Date)

(Time)

(Right here in our community)

(Room location)

This is your chance to get up close and personal with our representative to the State Assembly/Senate in Sacramento. Don't miss this opportunity to learn more about issues affecting our community and long-term care in general.

For more information, please see (Name).

Appendix E – Sample Media Advisory

Media advisories alert journalists to upcoming events. It gives the basic information: who, what, where, when, why. **A media advisory should arrive at news outlets 3 to 5 working days before the event.** Fax or email your advisory to the appropriate reporter, editor or producer at each news outlet on your press list and follow up with a phone call.

Media Advisory
Date

Contact Name
Phone Number

State Senator/Assembly Member (Name) to Visit (Community Name)

(City, CA) State Senator/Assembly Member (Name) will be touring the (Community Name) in (City) on (Date). S/he will tour the community, meet with (Title) (Name) and residents, and learn more about long-term care issues and concerns. Event specifics are:

WHO: State Senator/Assembly Member (Name)

WHAT: Legislative visit and tour of the (Community Name)

WHEN: (Day, Date, Time)

WHERE: (Street Address)

WHY: (Name), (Title) of (Community Name) wants to provide newly elected State Senator/Assembly Member (Name) the opportunity to learn first-hand how a long-term care community operates and to discuss issues of importance to staff and residents.

The (Community Name) was established in (year) and is home to (#) residents requiring various levels of long-term care from independent and assisted living to skilled nursing.

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