

# Advocacy Toolkit

The OrthoForum is working hard to represent our members. We have experts and professional advocates working to influence federal policy, however, when it comes to making a more personal impact with legislators, the power of grassroots advocacy cannot be underestimated.

Congress needs to be reminded of the value and importance of Orthopedics as a specialty and that we provide care for constituents and jobs in their states and districts. This toolkit shows you how to connect with your legislator and how to get the most out of your interactions. It provides key information that will allow you to foster an ongoing relationship and maximize your influence at home in your state.

## Congress Exists to Represent You

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Don't forget, members of Congress are elected in order to represent your interests and do what's best for their constituents. You vote for your legislator(s), and it's your voice and experiences which help guide their decisions. In order to remain in office they must follow this principle and be accessible and sensitive to the needs and desires of their constituents. They must be involved with the businesses and organizations that bring benefits to their community.

Members of Congress are always balancing multiple priorities at once and can have unpredictable schedules. With that said, most legislators are accessible if you know how to reach them. This guide will help you set up meetings, write letters, and make calls, as well as give you some guidance in how best to direct the conversation.

## How to Deliver a Strategic Message

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The business of government is intensely personal. In order to maximize your influence, you must build and maintain a relationship with your public official. The relationships that legislators value the most are the ones they make with their own constituents, and with the companies in their district/state that help them achieve their legislative, personal and political goals. Professional lobbying can only go so far to consistently educate legislators to adopt positions and pass laws that benefit the solar industry – that is why YOUR involvement is the most essential and effective method of education.

Grassroots advocacy is the most important element of our government affairs strategy. In addition to direct political support, there are a few basic techniques of grassroots involvement you can easily mobilize in your home state.

## How to Set Up a Meeting

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### Send a Letter

Certain officials may require a request in writing. You may use our [draft letter](#) as a guide for what to convey in these requests. Most legislators have a contact form on their website to make it easier to send a letter/message.

It is possible to meet with most officials, but occasionally their schedules are not flexible and a staff person will have to take the meeting. Visiting with staff can still be extremely useful. Often the staff person will have more technical knowledge about an issue than the official. The official may rely on that staffer to assist in making decisions about legislation.

### Follow-Up Call to the District Office

When you contact your legislator's office, ask to speak with the scheduler. Inform them that you are following up with a written request for a meeting in order to confirm the date and time. Your legislator may not be able to meet you with at the specific date/time you requested, so be flexible. They may also inquire about the general topics you wish to discuss.

Let the scheduler know that the meeting should take no longer than one hour. If there is more than one person attending the meeting, let the scheduler know their names and affiliations. If someone in your group knows the legislator personally or professionally, make sure that the scheduler is aware of the relationship.

It should be able to set up an in-person meeting with your legislator, but occasionally schedules will prevent this you will see a staff person instead. Don't feel snubbed - visiting with staff can be very useful. Often the staff person will have more knowledge on specific technical issues than the legislator. Legislators frequently rely on staff members to assist in making decisions on legislative policies. For most issues relating to the solar industry you will want to meet with the energy policy staffer.

For visits to the local office it is best to seek appointments during congressional recess periods when your member of Congress returns to your district. You can find updated [Congressional](#)

[Calendars](#) on the US Government Printing Office Website. Legislators are also frequently home in the district Friday through Monday when Congress is in session.

Confirm your appointment. After you schedule a meeting, send a brief email/letter that includes a list of those who will attend the meeting.

## Prep for the Meeting

It is important to know some background information about your legislator. Prior to the meeting we recommend you do some light research. A good resource is the Congressional Directory [www.congress.org](http://www.congress.org) or the official House and Senate government websites at [www.house.gov](http://www.house.gov) and [www.senate.gov](http://www.senate.gov).

Determine your agenda for the meeting. Prior to the meeting you should review specific policy items to be discussed and the general legislative 'ask' of the legislator. If more than one person is attending the meeting, determine beforehand who is going to say what and in what order; it will help make the meeting run smoothly. The person responsible for a particular issue should not be the only one to talk but they should be the one who begins the conversation. Also, remember to share your involvement with the national association.

Make it personal and bring it all back home. All legislators want to improve the economy and quality of life in their district/state. Take this opportunity to familiarize them with your company and all the people you employ. Educate them on the importance of independent orthopedic care and the beneficial impact on the people living in their congressional district.

Don't feel that you have to be an expert on specific policy initiatives. Most legislators are generalists. Be open to counter-arguments, but don't get stuck on them. If you don't know the answer to a question, say so. Offer to look into the question and that you will get back to the Member – which is an excellent opportunity to stay in touch and create an on-going dialogue with their office.

Legislators are always looking for facts and figures to support their arguments or guide their decisions. You can access our prep packet on the OrthoForum website.

## During the Meeting

Members should try to arrive ten to fifteen minutes early for the meeting. Participants should be aware that last minute schedule changes do occur and it is not uncommon for a staff person to be sent to cover a meeting on short notice.

Make the necessary introductions, including background information about you and your practice.

Remember to personalize your visit. Share specific information on how certain legislative policies will positively affect your practices ability to provide quality independent care for the people of their state/district.

What to discuss?

- NEED TO FILL IN ORTHO ISSUES

Ask" – What you would like the legislator to do?

If they say NO?

- Find out what their concerns are
- Try to see if there is a way to compromise or find middle ground

Or if there is no specific ask, it's always beneficial to...

- Familiarize them with your company and employees; and
- Educate them on the overall impact of your practice

## Meeting Tips

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It is always important to remember...

- The legislative schedule is very busy and always in flux
- Meetings run typically 15-30 minutes
- Interruptions are common and expected
- The member's leadership status and committees

- Legislative goals and history
- Legislators rely on outside sources for information
- Most responsive to people with long-term relationships
- Make your relationships known to the scheduler

Again, it is important to remember that the relationships federal legislators value the most are those with their own constituents and with the companies in their district/state. You help them achieve their legislative, personal and political goals. No amount of professional lobbying can consistently and persuasively educate legislators to adopt positions and pass laws that our industry – that is why YOUR involvement is the most effective method of industry education.

### After the Meeting

Participants should always send thank you letters after a meeting, especially if the official was specifically asked to do something. The key is to foster an ongoing relationship. If you had a good meeting with the official, you can invite him or her to visit your site/facility. Keeping your legislator involved and informed about your company is the best way to create a strong and personal relationship that will help the association overall.

### How to Conduct a Tour

A great way to build a relationship with your elected official and demonstrate how important your company is to the community is to invite them to visit your company headquarters. Tours at your facility provides a great opportunity for your legislator to meet your employees and to discuss your company's issues and concerns in depth.

By seeing the operations first-hand, your legislator will also have a better understanding of how certain legislative and regulatory proposals may impact our industry.

Most elected officials will be receptive, and recognize your invite as a valuable opportunity to meet their constituents (potential voters) in a friendly environment.

### Scheduling a Tour/Visit

The invitation should come from the President/CEO or management and be put in writing on company letterhead. Keep the invitation short and direct, offering several dates from which the elected official and their staff can choose. Provide background of your company and a brief description of the purpose of the visit. Do not be surprised if it takes several tries to find a date that

will work for both parties. For legislators, it is best to schedule the visit during a recess when they are more likely to be back in their districts; reference House and Senate calendars above.

Once an invitation has been accepted, the following tips should be kept in mind:

- The official's office should be contacted by phone or mail to confirm the date, time, the period of time allotted for the visit and any relevant information on the people the official will be meeting during the visit.
- Management and staff should be informed of the visit and given any information they may need.
- Decide specific legislative policies you want to discuss and how it will impact your company/employees. It is also wise to link your company with the community.
- Promote the visit! Notify employees of the date and time of the visit and distribute a brief biography of the official, explaining his/her importance.

Prepare a packet of material about the company and association. The packet should be sent to the legislator prior to the visit and also can be presented to the legislator's staff during the visit.

After the visit, it is imperative to send a thank you letter to the elected official and staff and a courtesy copy to anyone you deem appropriate. In the letter re-emphasize key points made during the visit and list some of the key people the official met.

Other follow up steps include:

- Send the official and press aide any press clips pertaining to the visit that appeared in local newspapers and internal publications for the company and the association or solar news clips in general
- Keep in contact with the official about upcoming legislation
- Offer to meet with the elected official's staff and serve as a resource on industry issues

### Sample Letter for Tour/Visit

<Date>

The Honorable XXX

United States Senate/House of Representatives

Washington, DC 20515

Fax: (202) 225-9764

Dear Senator/ Representative X:

I would like to invite you to my business, XXX, in XXX, to tour the facility and meet with our team. We would like to discuss [ISSUES] and how they are impacting the people in our area and the quality care they deserve

.  
INSERT background information about your company, i.e. number of employee, number of location, etc.

I will contact your office in the next few days to see when you have availability in your schedule. If you or any members of your staff have any questions concerning this meeting, please do not hesitate to contact me at [PHONE/EMAIL]. I look forward to hearing from you and appreciate your time and consideration.

Sincerely,  
XXX

- Direct letters and phone calls
- Individual or organized group visits with legislators
- Invitations to tour your facilities or participate in community events
- Serving as a personal source of information and data for the industry
- Don't – underestimate the legislator's staff
- They are policy specialists and will inform the Legislator of your views and requests
- Don't – forget to research background information about your legislator
- Don't – argue
- respect their view if different from yours
- Don't – push too hard for immediate action – we want to build the relationship, not cut it off by applying pressure

## Hosting a legislative “Meet and Greet”

One way to increase awareness of an issue is to host a legislative reception or “meet and greet” at your home or in your community. Receptions provide an excellent opportunity for physicians to interact with legislators and key staff members informally about an issue. Discussions initiated at a reception can be followed up with a legislative office visit.

- Determine which legislators and staff members you want to invite. Include other physicians from your practice as well as other OrthoForum members located in your area and their spouses.
- Recruit people who can help with the event and appoint one person as event coordinator. Office support staff and other OrthoForum members are examples of those who may fill this role.
- Determine the date, time and location of the event. Before you finalize the date, check with your local legislators’ offices to determine availability.
- Send invitations to legislators and other invited guests at least three weeks in advance. The OrthoForum can provide you with a list of physicians in your area. Request an RSVP by phone to your office, the phone of the event coordinator or an answering machine.
- Prepare name tags for all participants. Different colors can be used for legislators and their staff, etc. Have blank tags on hand for unexpected guests.
- Appoint several designated greeters to welcome guests as they come to your home. This should include the host(s) as well as other OrthoForum members.
- Develop a short statement about the issue to be made at some point during the event.
- Encourage physician attendees to share their personal stories about the issue with the legislators and their staff.
- Follow up with thank you notes to special guests, volunteers and others.