

Find your legislator(s): <https://www.votervoice.net/NCHA/Address>

An Effective Hospital Visit:

You have a great opportunity to educate your legislator and get acquainted by inviting him or her to tour your hospital. These tours introduce legislators to the constituents for whom your hospital provides jobs, and allows the official to put into perspective the real people, jobs and issues which affect voters in their district. Tours can be **mutually beneficial** to both you and your public official, since you both develop contacts for the future. Setting up a tour requires some advanced planning and a bit of flexibility, but is well worth the effort. Since the typical legislator is very busy while the Legislature or Congress is in session, he/she will probably prefer to tour your facility during one of the legislative or congressional recesses.



Step-by-Step Preparation for the Hospital Visit:

1. **Figure out what you want to show:** Be sure to consider how what you're showing a policymaker connects to the issue you want them to think about. For example, if you are trying to make the case for why you need more funding for a program, it's a good idea to show them the need, as well as how you have usefully (and frugally) spent money in the past. Consider the following:
 - a. **Hospital tour to include positive areas**
 - i. Areas of hospital working most efficiently (examples of LEAN)
 - ii. Areas of hospital with greatest patient interaction
 - iii. Areas of hospital led by strong hospital staff – opportunity for organic interaction with key employees
 - iv. Areas of the hospital where a legislator has played a key role in funding or support
 - v. Areas of the hospital that may have a personal connection with your legislator (do your research)
 - b. **Hospital tour to include areas of critical need (specific to legislative action)**
 - i. Emergency Department – Witness challenges around ED boarding of behavioral health patients
 - ii. Areas of hospital with greatest potential to be cut
 - iii. Areas of hospital that are not reimbursed and/or not profitable
 - iv. Areas of the hospital (or community initiatives) where the hospital is creatively and/or collaboratively meeting a critical need of the health of the community (example: food bank, job placement/training services, housing coalition)
2. **Decide who to invite:** There are a number of factors involved in this decision. Is this a visit for legislative staff or officials or a combination? (*It is strongly recommended that you do not ignore the staff.*) Likewise, be cognizant of the political situation in your community. You want to be sure to invite the right local officials and not step on any toes. If possible, the hospital CEO (or hospital leader with another personal relationship with the legislator) should lead the tour. In addition to the CEO, think carefully about who you want from your hospital to help you “make the case,” while keeping the total number of people actively participating in the tour to no more than five, allowing the opportunity for the legislator to be more candid and relaxed. Following are some types to consider:
 - a. **Physicians, nurses, other all-star hospital staff:** Officials enjoy speaking with the people who perform the day-to-day tasks of the program or project. Among one-on-one discussions with the leaders who are passionate about your programs, consider candid face-time with other hospital employees (cafeteria, other meeting).
 - b. **Patients:** “Real people” who already benefit from your work (or will in the future) and can speak with conviction and enthusiasm about your services will always impress visitors. Does your hospital have a Patient & Family Advisory Council (PFAC)? Start here to identify who to include.

- c. **Funders/Supporters:** Having those who have invested in your good works or who are leaders in the community present at the visit demonstrates support you enjoy. Consider inviting Hospital Trustees and Foundation Board Members.
3. **Decide on a timeline for the planning, invitation and follow-up** (and who will assume each).
4. **Draft the invitation:** Your one-page letter of invitation should be on hospital letterhead and be directed to the official's scheduler or executive assistant, usually in the district office. Call about one week after sending the first request to ensure it has been received and to answer any questions.
5. **Dealing with logistics** (consider the following):
 - a. Transportation: How will the officials get to and from the event? Do they need to park somewhere in particular?
 - b. Time: How much time can the official commit to the event? Do not try to cram too much into a short visit. Make sure you hit the highlights.
 - c. Food: If this visit is going to occur during a regular mealtime, you should consider setting up a discussion over an informal buffet or box lunch. Try to arrange the visit around a luncheon or breakfast, with the tour of the hospital either preceding or following it. There should be a limited number of your hospital or system's representatives participating in the meal function.
 - d. Weather: Obviously, you can't control the weather, but you can be prepared for all possibilities. Make sure you have enough umbrellas, bug spray, or whatever you'll need to make the visit pleasant for everyone. Use opportunities during severe weather to remind legislators that the hospital remains open 24/7 to support their community, regardless of dangerous weather conditions.
 - e. Are their privacy or special permission issues you need to address in advance (consider HIPAA)?
6. **Consider recording and/or publicizing the event:**
 - a. Photographer: Consider hiring a photographer or have someone on your staff designated to take pictures for use in a newsletter or on a website.
 - b. Note taker: Although you don't want someone writing down every word out of the official's mouth, do assign someone the task of preparing a written report after the visit.
 - c. Someone to tag (and thank!) the legislator on social media.
 - d. Consider inviting the media - but only after coordinating this coverage with the legislator or their press secretary.
 - e. Include a story on the visit in your hospital's internal and external publications.

Prior to the Hospital Visit:

- Inform all employees of the upcoming visit.
- Do some homework on your legislator's background. A short biography of the state legislator or congressman can usually be requested from his/her office or NCHA; this can be shared with your employees or key individuals. Find out what committees and subcommittees your guest is on. Are any of these committees considering legislation related to your interests? In short, **show the same interest in his/her activities that you expect him/her to show in yours.**

Conducting an Effective Hospital Visit:

- **Introduce yourself and any others in your group**, stating where you are from and your role/connection to the hospital or health system.
- Decide in advance **who will lead the discussion** and what key points you want to make.
- **Stay focused on the two or three key messages** you want the legislator to understand.
- Allow about an **hour or hour-and-a-half for the tour**, including a "sit-down" meeting.
- **Walk the tour yourself in advance** to make sure everything is in order and that you deliver your intended message. Inform participants in advance so they can be prepared.
- Answer any questions asked of you, but **if you don't know the answer**, tell the legislator that you will get back to him/her promptly with an answer.
- **Prepare a fact sheet on your hospital** for the senator or representative. This information can be pulled through NCHA's ANDI system. Include information such as: number of inpatients and outpatients served; number of staff, employees and volunteers; average payroll; amount of indigent

care provided; Medicare and Medicaid patient load; the economic benefit your hospital provides to the community, etc. Include your name, telephone number and email address on the paper in case there are follow-up questions. Don't overwhelm the legislator with materials during the tour.

- **Make the connection** between areas visited at the hospital and key legislation. Give examples of how the issue affects your organization and the senator or representative's constituents. **Make the ask**, where appropriate, for the legislator's support on an issue.
- **Notify the NCHA** about the planned visit. We can provide you with background information on the senator or representative and can assist you in compiling statistics or information needed to illustrate your concerns.

Conclusion of the Hospital Visit:

- If possible, invite legislator to stay at the hospital for a roundtable discussion with hospital leadership and board members
- Allow legislator ample opportunities to ask questions
- Allow legislator to share their personal experience with hospitals

Follow-up After the Hospital Visit:

- **Always send a "thank you" note:**
The note can be written from hospital leadership, Trustees or others who were involved in the visit.
 - Thank the legislator for his/her time.
 - Briefly restate your issue and draw relevant connections between those areas visited at the hospital and key legislation.
 - Include any follow-up information that was promised, along with an open-ended invitation for a return visit. Establish the hospital as a resource for healthcare questions.
 - Compliment any of his/her aides, by name, who helped coordinate the visit.
- **Send a "thank you" note to those aides** who helped set up the meeting. You may be working closely with them in the future, so don't let their deeds go unnoticed.
- **Be sure to send the senator or representative copies of any media coverage generated.** If a photograph of the official was taken during the hospital visit, send them a copy if available.
- **Provide feedback about your meeting to NCHA** so that we may adjust our lobbying strategies, if needed.
- **Continue regular communication with the legislator** (*goal=once per quarter*). Share patient stories or positive work happening at the hospital. Involve Board members or other key hospital leaders and physicians in this communication.

Tips:

- Be brief.
- Be honest.
- Be prompt, but be flexible. Senators and representatives may be late for meetings due to their full schedules, or they may get interrupted during your meeting.
- Don't be disappointed if you end up meeting with staff instead of the senator or representative. Legislators depend on advice from their staff because it is impossible for them to follow all the issues themselves. Staff are gatekeepers and they can sometimes be the real driving force on an issue.
- Consider using this model to engage other key community leaders.