

A “How To” Guide to Facility Tours for Elected Officials

The purpose of this Guide is to help you arrange a tour of your facility for any elected official such as:

- U.S. Senators
- U.S. Representatives
- Governors
- State Senators
- State Delegates/ Representatives/ Assembly Members
- Mayors or other Elected Officials

Tip: Facility tours play a critical role in the American Health Care Association’s educational and legislative efforts. They enable policy makers to see firsthand the issues that affect our industry, and most importantly, they see how their constituents are impacted by what they decide in Washington, the state house, or city council. As a result, facility tours have proven to be one of the long term care industry’s best grassroots lobbying tools.

The process is the same for any elected official and is very easy. If you need any help or have any questions about setting up a tour, please contact Matt Smyth, AHCA’s Director of Grassroots, at 202/898-2817 or msmyth@ahca.org.

Issuing a Tour Invitation

Tip: Try to invite the legislator during a personal meeting, extending a formal letter. Schedule the facility tour when the member is in the home district and offer several dates, possibly during a special event at your facility. The BEST time to schedule a tour is during campaign season, when the legislator is actively looking to meet with constituents. See sample invitation at end of guide.

Get to Know Your Legislators

Start by getting to know your legislators—building personal relationships with legislators is key when trying to influence legislation. A good place to start is a meeting at your legislator’s local office. Meetings with legislators are mutually beneficial because:

- You are the expert on long term care issues. Due to their heavy workloads, legislators have to be generalists on a host of issues.
- As a constituent, you have the ultimate influence over a legislator-you vote!
- Legislators seriously weigh how every issue "plays back at home." You provide them with a feel for that, as both a constituent and long term care provider.

When developing this relationship, it is important to meet with the legislator as soon as possible. Campaigns are a great time to get to know your legislators - legislators never forget the people that helped them in their campaigns. Additionally, regardless of whether the legislator is in session or not, stay in contact after the initial meeting so when issues arise, the legislator will look to as a resource on long term care issues.

Meeting with a Legislator

- To schedule a meeting, call your legislator’s office and discuss potential dates with the legislator’s scheduler. When scheduling, you should suggest numerous dates, giving yourself a better opportunity to meet. It is best to try and schedule these meetings between Friday and Monday, because that is usually when a legislator is in his/her home district.
- Know the issues. Contact AHCA’s Washington office or your state association for issue papers and packets. Have a one-page issue paper that you can leave behind.
- Call closer to the date of the meeting and reconfirm the appointment. If possible, try to find out how long you will be able to spend with the legislator and prepare accordingly.

- Have one or two discussion topics planned and stick to them. A legislator's time is valuable so be brief and to the point.
- Always ask the legislator to take a specific action.
- Invite the legislator to visit your facility.
- Let the legislator know that you are an informed, professional resource on long term care issues and are available if they need information.
- Follow-up with a thank you note after every meeting. Be sure to summarize the meeting in your note.

Inviting a Legislator to Your Facility

The best time to invite a legislator to your facility is when Congress or state legislators are out of session. If the legislators are in-session, try to plan the tour when there are not pressing legislative activities and only on days when there are not any votes - typically Monday and Friday. Election season is also a great time to plan a facility tour.

Candidates welcome the chance to meet with constituents. A tour of a long term care facility can provide them with desirable photos and press coverage.

To schedule a facility tour, begin by calling or visiting your legislator's office and obtaining several possible dates when he/she is available. Follow the call with a formal letter of invitation. Describe the facility, its operation, and the number of employees and residents.

Planning A Tour

Tip: Do not try and plan anything elaborate. The tour should include a simple display of the daily work of a long term care facility. Interaction with a wide variety of residents and staff is essential. Try to find time for the legislator to meet with a group of assembled employees. A key part to the facility tour is planning a one-on-one discussion with the legislator to discuss important long term care issues. Be sure to prepare a printed fact sheet about your facility and be prepared to answer questions from the legislator and his/her staff members. Finally, provide an opportunity for the legislator to address the gathered attendees (residents, staff and families), such as at a reception room or main hall where you can offer refreshments (like punch & cookies.)

Once you have had your personal meeting with your legislator and extended an invitation for a tour of your facility, it is time to start planning your tour. A well-planned tour leaves a legislator with a better understanding of your facility and can make an impact on how he/she sees long term care issues. A well publicized tour can also enhance your visibility to the community.

Although you don't have to, it may be a good idea to tie your tour to a special event. All of the following special events are potential opportunities for legislators to share the public spotlight at the time they visit your facility:

- Groundbreaking for new or expanded facilities
- Scholarship presentations
- Professional award ceremonies
- Employee of the Year Award
- Launching of local civic or health care initiative
- Facility open house
- 100 year old birthday celebration
- Inauguration of new services for residents or community

Planning Your Tour: Step by Step

1. If more than one public official is invited for the same tour, be sure each one knows in advance that the others will be included. Unless it is a major event, plan to invite one elected official at a time.
2. Set aside at least one hour for the tour. Breakfast, lunch, or a reception should be included. Notify employees about the tour and provide them with background information on the visitors. You can request campaign pamphlets from the visiting candidates. They will appreciate that their message is being delivered.
3. Include residents and their families in the process so they know you are actively involved on their behalf.
4. Prior to the event, AHCA can send a press advisory to local media announcing the tour and coordinate with the legislator's aide who will notify the media of dates and times.
5. Arrange for a good photographer to be on hand to take a selection of quality, non-intrusive photos of the event. Every elected official likes to have photos of meetings with constituent groups. AHCA can help arrange for a photographer.
6. Make it possible for employees, residents, and family members to meet the elected officials or candidates. Schedule the visit so that the elected official or candidate will have time to make brief remarks to assembled employees.
7. Arrange for some time when you and your senior staff can sit down with the legislator in your office to discuss long term care issues.
8. The tour should be conducted by the administrator. Assign specific supervisors to explain the operation of their work areas. Prepare them so they are comfortable and not surprised by the visitors.
9. After the tour, ALWAYS send a thank-you letter to the officials who made the visit. It is a nice touch to include copies of photographs or news articles related to the tour.

Prepare a Facility Profile

You should prepare a profile of your facility that shows:

- Number of residents and services provided
- Number of employees
- Dollars paid in federal, state, and local taxes by your facility
- Dollars paid in property taxes
- Number of vendors who support your facility (highlight local vendors)
- Unique services that you are providing to your employees, residents, or the community (i.e., health seminars)
- List of community service programs sponsored by your facility or your employees

Conducting a Tour

Getting your Message Across

Tip: Be natural. Do not lobby them too much with political issues. By allowing them to see the daily operations of your facility, they will never look at long term care issues the same again.

1. Always manage the actual tour yourself.
2. Before or after the meeting, show the legislator some of the realities of resident care and compliance with changing standards. Emphasize quality resident care during the tour and throughout the visit.
3. Show the legislator any area of the facility that has been subject to changing compliance standards or interpretations. Discuss the costs of achieving compliance.
4. Point out the amount of paperwork that is required for compliance and the time and personnel that are needed to complete the paperwork.
5. If there is a regulation that poses particular difficulties in application to your facility—for example, storage of linen carts or cross contamination—point out to the legislator some of the "real life roadblocks" to compliance.

6. Point out as many types of patients as possible and discuss the range of care provided and varied cost of care. This will help to give a realistic and well-rounded picture to the lawmaker.

Communicating With Your Legislator

It is important that you include not only yourself but also other members of the staff in your meetings and tour with the legislator. While you are speaking with the legislator, ask "open ended" questions in order to elicit lengthier, thoughtful responses, for example:

- *"From your legislative perspective, what do you see as the key issues affecting long term care in America today?"*
- *"How do you think we should address the rising costs of long term health care in the years to come?"*
- *"Do you see the need for more community involvement in the legislative process? If so, what can we do together to help encourage more involvement?"*

Additionally, it is best to stick to the facts. Don't give way to emotional arguments or unsubstantiated opinions and never stretch the truth. Also, be a good listener, even if the legislator disagrees with aspects of our position. Acknowledge where other views have merit, and stress that you want to work more closely whenever possible. Always try to end on a positive note and leave the meeting open-ended for further discussions.

Follow Up After the Tour

Tip: Make sure to follow up promptly by sending a thank you letter, as well as pictures and press clippings.

An essential part of a successful political life is a prompt follow-up. Your follow-up should be immediate, courteous, and memorable:

- Send a "thank you letter" (see below) the day after the facility tour, while the details of the tour are fresh in the legislator's mind. Send the letter to the Washington office of the national legislator, or to the office of a state legislator in the state capital. Also send a letter to any legislative staffer who helped make the visit possible.
- To make your follow up memorable, add a personal note from the tour, such as a subject you discussed one-on-one with the legislator or a commitment they made to you about their continuing support of long term care issues.
- Send copies of the photographs taken during the tour, while they were meeting your residents and staff. Also, send any newspaper clippings about the event from the local press. Legislators appreciate visual materials because they can be used during campaign time, which can further strengthen your personal connection.
- If the local press did not cover the event, send the editor a brief write up and any good photos of the public official.
- Communicate with your state association and AHCA's Washington, DC staff. Send AHCA's staff a summary of the tour, photos, press clippings, and any significant comments made by the legislator about long term care issues.

AHCA is Ready to Assist You

The AHCA team in Washington, DC is certainly the single most valuable tool you have to get involved in the national political process. They know how to get a legislator's attention—and cooperation. They know the ins and outs of Capital Hill activities, committees, subcommittees, legislative process, and staff contacts.

AHCA resources are there to help you. You can contact Matt Smyth, Director of Grassroots, 202/898-2817 or msmyth@ahca.org to discuss and plan your tour. Please keep AHCA informed about your planned activities in advance. Start by filling out the *Give us Feedback* form below.

With the proper planning, agenda, and follow-up, conducting facility tours for national and state legislators can become an easy and enjoyable part of your grassroots political activism. It helps your particular facility while supporting your entire industry, and AHCA thanks you for your involvement.

Sample Invitation – On Facility Letterhead

Date

The Honorable John Doe
U.S. House of Representatives
Washington, DC

Dear Congressman Doe:

Long term care is one of the most critical issues facing Americans today. In 2006, 2.8 million of our fellow citizens—the first of 77 million baby boomers—turned 60 years old. As our nation’s seniors and those who care for them begin to make important choices about their health care and especially, their long term care needs, we look to our leaders in Congress to assure that long term care services will be available when we need them.

I’d like to extend to you an invitation to visit the *Name of facility in Anytown* during the *August* recess—at a date and time of your convenience – to speak to residents, family members, and caregivers and learn more about the issues facing this important health care sector. We hope to provide you with a forum where we can demonstrate our support for your leadership on long term care, and discuss critical issues facing our regions’s seniors.

Along with my colleagues at the *ABC (state health association name)* Health Care Association, we realize the enormity of the responsibility on our shoulders—to maintain and improve quality care for the millions of residents under our care, and for the thousands more who we will serve in the coming years.

And I am proud to say we are doing that. Quality care has improved significantly over the past several years. Studies conclude that the care provided by long term care providers is getting better.

Because of the great challenges we face in the coming years, your ongoing support and the support of your colleagues is crucial. Several key issues confront our ability to meet the needs of our growing long term care population, including potential Medicare and Medicaid cuts, and will put undue strain on providers trying to maintain quality of care and quality of life now and in the future.

I look forward to speaking with you soon, and sharing ideas on safeguarding the care of our frail, elderly and disabled in the years to come.

Sincerely,

Administrator

FACILITY LETTERHEAD

JOHNSVILLE LONG TERM CARE FACILITY
1234 Main Street
Johnsville, Missouri 01234

January 5, 2007

Honorable Samuel Jones
United States House of Representatives
Washington, DC 20515

Dear Representative Jones,

On behalf of the residents and staff of the Johnsville facility, I want to thank you for making time in your very busy schedule to visit with us on January 2nd. Everyone here greatly enjoyed meeting you and each of us was gratified by your obvious commitment to issues affecting the quality and future of long term care in our community, state, and nation.

Your comments on private long term care insurance made a particularly lasting impression on me, and I'm sure, on our staff. It is reassuring for those of us committed to helping to meet the daily long term care needs of the elderly and disabled citizens of our community that elected officials such as you share our commitment.

I know that your most valuable commodity is time, and we all appreciate that you have shared some of it with us. I look forward to speaking with you again soon. If I can be of any assistance, in particular when technically complex issues involving long term care are before you, please call on me any time.

Sincerely yours,

Roberta Johnson
Administrator

P.S.: Enclosed are some of the best photos we took during your tour of the Johnsville facility, as well as some press clippings about the event. I hope these will be of use to your staff for publicity purposes in the future.

SAMPLE: PRESS ADVISORY

For Immediate Release

Contact: John Doe, Senior Administrator, Quality Long Term Care Facility, (123) 555-4850

What: Quality Facility will host a facility tour for Senator Bill Jones to demonstrate the commitment to quality care for the elderly and disabled in our community, and how this reflects on national news affecting long term care and the resources needed to meet this commitment.

Where: Name of Facility
Address

When: Date of Event
Time

Who: Name of the legislator and any other VIPs who will accompany him or her, as well as senior administrators in the facility who will participate.

Agenda: Briefly describe the tour schedule (e.g.: viewing daily operations, meeting residents, lunch, brief remarks to assembled employees).

FACILITY LETTERHEAD

JOHNSVILLE LONG TERM CARE FACILITY
1234 Main Street
Johnsville, Missouri 01234

January 5, 2007

Honorable Samuel Jones
United States House of Representatives
Washington, DC 20515

Dear Representative Jones,

Thank you so much for taking time out of your busy schedule to meet with us recently in your District Office. I greatly appreciate your interest in issues affecting the quality and future of long term care.

Our discussion on (HR 4321) was very beneficial. I am pleased to know you are committed to helping those of us who are involved in daily long term care needs of the elderly in our community by considering co-sponsorship of our reform bill.

Again, thank you for your time. I look forward to following up with Peter James of your staff. Please call on me if I can be of any assistance, particularly when you are called upon to consider the many complex aspects of long term care.

Sincerely yours,

Roberta Johnson
Administrator

NOTE: If you invited a legislator to visit your facility for a tour or event, be sure to mention it in your thank you note. Remind the legislator you will be sending more information. Also, be sure to include your business card in your letter.

Give Us Feedback

Name of Facility:

Administrator:

Address:

Phone:

Fax:

Date of Facility Tour:

Participating Legislator:

Topics Discussed (be sure to include any significant comments/feedback from the legislator):

Did any press attend? If so, who were they (paper, TV station) and did they cover the event?

Were any photos taken?

If so, can we get some copies?

General thoughts/observations about your tour:

Getting a Tour Invitation

Planning a Tour

Conducting a Tour

Follow-up After a Tour