

Tips for Effective Advocacy in a Virtual Environment

Leadership Day is **one** activity in your chapter's year-round plan to create and maintain relationships with members of Congress. It is critical that your meetings with your members of Congress, whether virtual or in person, build on other activities taking place in Washington **and** at home. Remember, your professional expertise makes you a very valuable resource on health-related issues for your members of Congress. Below are suggestions to help you prepare for your meetings and ideas for follow-up activity at home.

Pre-Meeting Preparation

If you can't get your Member's attention in 30 seconds, you haven't focused your message.

- Convene your chapter members prior to any joint meeting with lawmakers in order to coordinate speaking roles and decide on which key priority issues to raise during a given meeting. This pre-meeting planning will be important when advocating in a virtual environment.
- Participate in the virtual advocacy workshop session that will take place via Zoom on May 25 from 11:00 – 12:30pm ET. This session will feature the do's and don'ts of advocating in a virtual environment and will also walk you through the logistics of your virtual meeting schedules and available resources in the Web-based portal.
- Develop an informal agenda for each meeting. Familiarize yourselves with each member of Congress' background, committee assignments, political orientation and policy priorities.
- Study the College's advocacy priorities for Congress as outlined in the issue briefs, once posted on the Leadership Day website.
- Generally, you can expect 15-20 minutes of your Member's time, or their staff. Since his or her time is limited, be sure to be accurate, brief and try to tell your Member or their staff something new (e.g., a story on how the issues/policies affect constituents back home).

Tips for a Successful Meeting

As a volunteer advocate, it's your job to humanize the issue.

- When advocating virtually via video/audio teleconference, join your meetings five minutes prior to the start time to adjust any last minute coordination with your chapter members. While you want to follow the lead of your lawmaker/congressional staff during the meeting, remember that you have a purpose and an agenda. Try to keep introductions brief to optimize time. After introductions, briefly describe the College and your own practice. Personalize your remarks by highlighting the specific concerns of local physicians and their patients. Stories are important for several reasons:
 - Real-life situations demonstrate the problem.
 - Stories make your issue memorable, give it credibility, are easier to remember and cut through information overload. You are taking a statistical abstract and turning it into a human problem.
 - Politicians are people. While they are interested in numbers and the broad scope of things, they respond more to their constituents.

- Take advantage of this opportunity to discuss issues with your lawmakers and their staff by being as specific as possible in what you are asking them to do.
- End the visit by soliciting the Member’s or staff views of each issue you have discussed. If there is disagreement, listen to his or her perspective and then present your views. You will enhance your effectiveness if you can demonstrate a willingness to participate in a friendly exchange of ideas. **If there is agreement, get the Member’s commitment to take the specific action(s) requested on each issue (e.g., cosponsor a bill).**
- As you conclude the meeting, let your Member and/or staff know that you will be emailing them copies of the issue briefs (which you can easily send by using the “Thank You Note” feature in the meeting web-portal that will be pre-populated with the correct staffer’s email address). Thank the Member and staff for their time and offer to be a resource on health issues.

Don’t be disappointed if the meeting is cut short or staff conducts the visit rather than the Senator or Representative. Staff members typically are instrumental in shaping the Member’s views and can be good contacts for your chapter.

Social media is another important tool for engaging with your members of Congress, and one of the most popular methods is through Twitter. Most all members of Congress are active on Twitter, have their own Twitter handles, and routinely share their views and latest news through this medium. It is a quick and easy way to get your message out and we do recommend that you follow your members of Congress on Twitter so that you can stay abreast of their latest legislative efforts. Twitter allows you to send out a very brief message (up to 280 characters) to all of your followers that typically includes a link where more information is available. It is a great and effective way to advocate because information is made available in small doses. ACP has developed some [“Social Media and Advocacy Tips”](#) to help guide you as you advocate via Twitter.

Meeting Follow-Up

It’s what you do after Leadership Day that will determine your success at getting what you asked for.

- Each Leadership Day participant will be asked to fill-out a Congressional Visit Reporting Form for each office visited which will be available electronically through the Web-based portal where your meeting schedules are located. Please complete these forms, preferably shortly after your meetings, when the content of each meeting is fresh in your mind. Chapters also can create a debriefing summary (see “Actions beyond Leadership Day,” below, for more information).

Actions Beyond Leadership Day

- **Governors’ Newsletter Article:** Write an article for your next chapter newsletter on your congressional visits. Include your legislators’ positions on top issues. Include thanks to any legislator who has taken the requested action and supports one or more of the College’s issues. If you thank a legislator in the article, send a copy of it to the legislator’s office so he or she knows your chapter is aware of his or her work. Many chapters post photographs of their Washington visit on the chapter Web site.

There is only one time to lobby – year-in, year-out, and year-round.

- **In-District Meetings:** Continue to make personal visits with legislators after Leadership Day. Personal visits are your best opportunity to discuss specific issues and to enhance the likelihood that you will be remembered. Schedule visits with your Members over congressional recess periods, virtually if necessary. Members have at least one home office that is listed on their Web page (www.house.gov/ or www.senate.gov/). Members typically can spend more time meeting with constituents at home, and such meetings tend to be more focused and meaningful.
- **Chapter Meetings:** Invite your elected representative to speak (“virtually” if face-to-face is not possible) at your regional meeting or other chapter forums. These settings provide an excellent opportunity for an exchange between the lawmaker and ACP participants during “question and answer” sessions. Chapter meetings are also an excellent forum to highlight state and national issues, and what actions need to be or are being taken. In addition, having a legislator at a meeting (even if it is virtually) provides an excellent opportunity to recruit new Advocates.
- **Town Hall Meetings:** Participate in local town hall meetings arranged by your legislators or state medical association. Most lawmakers are convening these town hall meetings virtually during the pandemic. Participating in town hall meetings also helps educate others in your state about the College’s issues. To find out when your legislators are holding public meetings, sign up for their newsletters (check their Web pages), or contact their local district or state offices. Ask your members’ staff if they have a mailing list for health care issues.
- **Physician Advisory Committees:** Some members have standing physician advisory committees on which you can volunteer to serve. Others hold “Doctors Roundtables” and other meetings with physicians. Check with your member’s district office to see if and when your legislators have such a forum. If your member does not have such a forum, suggest that he or she initiate one. Offer to assemble a group of physicians (and other health care professionals) who could advise your representatives on health-related issues.
- **Sign up to be an Advocate in the Advocates for Internal Medicine Network (AIMn):** The College sends Legislative Alerts to Advocates when it is critical for congressional offices to hear from constituents (sign up online at <http://www.acponline.org/advocacy/aimn/>.) Congressional offices use constituent letters, faxes, phone calls and e-mails to gauge constituent opinion on specific issues. The more personalized the message, the better. Remember, each issue has more than one side. Congressional offices are also hearing opposing views. Don't be offended if you receive a form letter in response. Members must answer thousands of constituent letters a week.
- **Hold a debriefing session with Leadership Day delegates to evaluate your chapter's participation.** Discuss ways the chapter can make its future participation more valuable and develop recommendations for enhancing the program. ACP’s national office would welcome any suggestions you may have for improvement. The debriefing could be done over a conference call or by Zoom. A summary created from the discussion could be shared with your chapter Health and Public Policy Committee (HPPC), chapter leadership, and Advocates. It also could be the basis of an article in the Governors' Newsletter.

All things being equal, politicians will go with the flow. Our job is to create the flow.

- **Write a letter-to-the-editor, “Op-Ed” or press release.** Working with the media can impact public policy. Media coverage reaching a large group of constituents focuses public attention on an issue and can influence the outcome. Contact the Communications and Public Affairs Department of the Washington Office for assistance with drafting op-eds, letters-to-the-editor, press releases, talking points for interviews, media contact lists, or help coordinating media events at your Chapter meetings.
- **Follow-up with the Washington Office and provide us with your suggestions.** Be sure to report contacts and activities with legislators to Shuan Tomlinson, Senior Analyst, State Health Policy and Grassroots Advocacy (stomlinson@acponline.org). Also, let the Washington Office know how your legislators are reacting to the College’s message. Is there something that we need to do better to make our case? Do we need to follow-up with their legislative staff? If you have an advocacy suggestion for us, submit it via our “[suggestion box](#).”

Facts on the Legislative Process

- **Bill Introduction/Sponsorship:** Legislators can be encouraged to introduce a bill to address a specific issue, or to co-sponsor a bill introduced by another senator or representative. Obtaining a large number of co-sponsors on a bill is one strategy for gaining attention and credibility for an issue.
- **Subcommittee:** An important time for constituent involvement is when a bill is in the subcommittee stage. This is the stage when legislators begin evaluating specific bills, policies, and legislative language. Grassroots advocates can communicate their positions on the issue and suggest specific provisions or language. Action by constituents of subcommittee members can be very effective at this point.
- **Full Committee:** Grassroots advocacy at the full committee stage is also very important. This stage typically follows subcommittee consideration of bills and policies, but not always. Communications may focus on supporting or opposing specific language developed by the subcommittee; encouraging legislators to sponsor amendments; and asking the committee member to vote for or against the bill. Again, action by constituents of committee members can be most effective.
- **Floor:** Constituent communication with all senators and representatives is important when legislation comes to the House and Senate floor for a vote. Grassroots efforts at this stage focus on encouraging a legislator to either vote for or against the bill; to sponsor a floor amendment; or to vote for or against a floor amendment offered by another legislator.
- **Conference Committee:** Opportunities for grassroots impact are more limited at the conference stage. Conference committees convene to work out the differences between similar bills passed by the House and Senate. However, grassroots communications - particularly from constituents of conferees - may influence whether the House or Senate provision is accepted in the compromise bill. Once a conference committee has worked out the differences between the House and Senate version of a bill, a final reconciled version is typically then presented for a vote in each chamber.

Titles and Job Functions of Congressional Staff

- **Chief of Staff (COS) or Administrative Assistant (AA):** The COS reports directly to the senator or representative, and usually is responsible for evaluating the political aspects of various legislative proposals and constituent requests. The COS usually handles the overall office operations, including the assignment of work and the supervision of key staff.
- **Legislative Director (LD), Senior Policy Advisor:** The LD is usually the senior staff person who sets the Member's legislative priorities and makes recommendations for action on particular issues. Senior policy advisor is sometimes used for committee staff.
- **Legislative Assistant (LA):** In most congressional offices, there are several LAs and responsibilities are assigned according to particular expertise in specific areas (*e.g.*, health, tax, environment, energy, etc.).
- **Legislative Correspondent (LC):** The legislative correspondent reads, logs and tallies letters and other written correspondence from constituents and usually drafts the reply on the legislator's behalf.
- **Press Secretary or Communications Director:** The press secretary's builds and maintains open and effective lines of communication between the member, his or her constituency, and the general public. The press secretary knows the benefits, demands, and special requirements of both print and electronic media, and how to most effectively promote the member's views or positions on specific issues.
- **Scheduler, Appointments Secretary or Personal Secretary:** The Scheduler is responsible for managing a legislator's time (*e.g.*, congressional responsibilities, staff requirements, and constituent requests). The Scheduler may also be responsible for making necessary travel arrangements, arranging speaking dates, visits to the district, etc.
- **Caseworker:** The caseworker is the staff member usually assigned to help with constituent requests by preparing replies for the member's signature. The caseworker's responsibilities may also include helping resolve problems constituents present in relation to federal agencies (*e.g.*, Social Security and Medicare issues, veteran's benefits, passports, etc). There are often several caseworkers in a congressional office.

Glossary of Legislative Terms

- **Bill:** A proposal to change the law.
- **Amendment:** A change to a bill, motion, act or the Constitution.
- **Appropriation:** A formal approval to draw funds from the Treasury for specific purposes.
- **Authorization:** A law creating a program and outlining funding. The authorization to actually draw funds from the Treasury and the amount to be drawn are established by an appropriation.

- **Budget:** The President's annual proposal to Congress, usually submitted in early February, for federal expenditures and revenues for the coming fiscal year (which starts October 1).
- **Budget Resolution:** House and Senate-passed guidelines, and later caps, on federal budget authority and outlays. The Budget Resolution is not submitted to the President for signature or veto. It is considered a matter of internal congressional rules and procedure. Bills that would exceed budget caps are subject to a point of order - although waivers have been granted regularly in both House and Senate.
- **Conference Committee:** The House and Senate appoint conferees to a conference committee to resolve differences between House and Senate-passed versions of the same legislation.
- **Conferees:** Senators and representatives appointed to serve on the conference committee.
- **Co-sponsor:** One or a group of senators or representatives who introduces a bill for consideration by Congress. The initial sponsor of the bill may send a "Dear Colleague" letter asking other Senators or Representatives to join in sponsoring the proposal. A large number of co-sponsors increase a bill's chances for consideration.
- **Filibuster:** A delaying tactic to prevent action in the Senate by speaking continuously. It takes 60 votes to end filibuster.
- **Fiscal Year:** The federal government's fiscal year runs from October 1 through September 30.
- **Hearing:** Meetings of committees or subcommittees to gather information on the ramifications of proposed legislation, investigate problems, or explore issues.
- **Lame Duck:** A member of Congress (or the President) who has not been re-elected, but whose term has not yet ended.
- **Majority Leader:** The leader of the majority party in the Senate is called the Majority Leader. The Majority Leader in the House is second in command of the majority party, after the Speaker.
- **Mark-up:** After hearings, members of a committee or subcommittee examine a proposed piece of legislation line-by-line to determine what additions, deletions, or amendments should be made. This activity is referred to as "markup". Often the chairman of the subcommittee will draft a starting proposal, referred to as the "chairman's mark."
- **Minority Leader:** Leader of the minority party in the House or Senate.
- **Point of Order:** An objection by a member of Congress that the pending matter or proceeding is in violation of the rules. The presiding officer accepts or rejects the objection, subject to appeal by the full House or Senate. The power of the presiding officer to rule on points of order, however, is stronger in the House than the Senate.
- **Report:** A printed record of a committee's actions and views on a particular bill or matter.

- **Speaker of the House:** Presiding officer of the House, leader of the majority party in the House, and next in line to the Vice-President for succession to the presidency. The Speaker is one of the most powerful offices in Washington.
- **Sponsor:** The representative or senator who introduces a bill or resolution.
- **Whip:** Senator or representative who serves as an internal lobbyist for the Republican or Democratic party to persuade legislators to support the party position, and who counts votes for the leadership in advance of floor action

Online Advocacy Resources

From ACP

- **ACP Advocacy Section:** Learn more about ACP's advocacy positions
www.acponline.org/advocacy/
- **ACP Advocate Newsletter**
<http://www.acponline.org/advocacy/newsletter/>
- **The ACP Advocate Blog by Bob Doherty**
<http://advocacyblog.acponline.org/>
- **ACP Legislative Action Center (LAC):** Read the latest legislative alerts and contact your members of Congress.
<http://cqrcengage.com/acplac/>
- **State Health Policy** program to help internists gain influence in their state capitals
http://www.acponline.org/advocacy/state_health_policy/index.html

From the Federal Government

- **White House Health Reform**
www.healthcare.gov/
- **House of Representatives**
www.house.gov/
- **Senate**
www.senate.gov/
- Legislative information from the **Library of Congress:** Track the status of bills, votes and access information on your members of Congress.
<https://www.congress.gov/>
- **Centers for Medicare and Medicaid Services:** Includes Medicare regulations, press releases, studies, etc.

<https://www.cms.gov/>

- **Medicare Payment Advisory Commission (MedPAC):** Advises Congress on Medicare issues.

www.medpac.gov/

Others

- **Vox:** How to get Congress to do what you want: Lawmakers explain how to change their opinion.
http://www.vox.com/policy-and-politics/2017/4/19/14949234/how-to-change-opinions-congress?utm_campaign=vox&utm_content=entry&utm_medium=social&utm_source=twitter