



State Advocacy Meeting Toolkit Lobby Days, In District, & Virtual Meetings

One of the most effective ways of letting elected officials know your chapter's views on state legislative issues is by communicating through a face-to-face meeting. When a group of people from an elected officials' district requests a meeting regarding a particular issue, the elected official wants to hear their point of view. Organizing meetings between your members and state legislators provides them with the information they need to make the best decisions for their constituents.

Because advocacy can be so valuable in getting an organization's view known, the planning and implementation of meetings with elected officials whether they are a lobby day at a state capitol, meeting in the district, or virtually using internet video technology is very important. The advantages of the different types of meetings can vary. Elected officials do take heed to large numbers of advocates rallying at the capitol as part of a lobby day, meeting in district can be more casual without the distractions common in the capitol, while, virtual meetings can offer the flexibility in schedules for both advocates and elected officials. Your success will be based on how well you organize your members in advance arming them with specific talking points on the Chapter's advocacy issues, scheduling the meetings, and getting them in front of the elected officials. The more effectively you plan for your grassroots meetings, the more seriously the elected official is likely to view your chapter.

Before you begin planning your meetings, it is essential to review your state lobby laws. These laws can vary greatly from state to state, and failure to follow these laws can give surgeons a serious "black eye" with legislators and the public and can result in civil sanctions. For more information on your state lobby laws please visit <https://www.ncsl.org/research/ethics/50-state-chart-lobby-definitions.aspx>

The American College of Surgeons (ACS) has put together this State Advocacy Meeting Toolkit to support ACS chapters in organizing lobby days in their respective state capitals, in district meetings, and virtual meetings with legislators. A toolkit specifically on organizing a Lobby Day can be found here.

In addition to the toolkit, ACS State Affairs staff is available to assist with overall

planning, provide meeting training, and participate in the event. Please contact ACS State Affairs staff at 202-337-2701 or state_affairs@facs.org for more information.

Types of Advocacy Meetings

The following is a brief description of the types of advocacy meetings you can employ to advocate for your chapter's legislative goals. Included with the descriptions are important considerations for each meeting type.

Lobby Day at the State Capitol

Sponsoring at Lobby Day at the State Capitol is a tried and true way for organizations to meet with legislators. A state capitol is busy with legislators, staff, and lobbyists working between committee hearings and session work on the floors of the respective House and Senate chambers. Participating in a lobby day is a great way for members to see firsthand the legislative process in action including attending committee hearings and votes on bills.

Due to the busy nature of a state capitol during session, there are challenges to setting up meetings. Here are important considerations for sponsoring a lobby day:

Selecting a Date. When planning your lobby day the first thing to consider is the legislative calendar; pick a date when the legislature is in session. A date chosen earlier in the legislative session is important so that your issues can be heard before legislative deadlines, and so that you can make an impact on the process. However, you don't want to plan so early in the legislative session that you have a hard time making appointments and preparing materials. For example, mid-February can be the ideal time to plan a lobby day for a state legislature that convenes in January and adjourns in late spring or early summer. In some cases, it may be necessary to sponsor a lobby day early in the session as well as later in the session if your legislation is moving towards passage and needs extra support.

In some state legislatures, organizations are required to seek permission to schedule a lobby day and must work with the capitol to make arrangements for the day; be sure to check on those requirements.

Creating a Schedule. After choosing the date for your lobby day, you will need to create an event schedule. Some chapters choose to host a one-day meeting with attendees arriving early in the morning for a briefing session before heading

to the capitol for meetings with legislators. Once the meetings have concluded the lobby day is adjourned.

Others will host a two-day event that may include a more in-depth briefing session with guest speakers, hands-on lobbying workshops, and a review of the issues on the first day. The briefing session may be followed by a reception with a special guest legislator and invitations to legislators and their staffs or other elected officials including supreme court justices. The second day provides attendees with the opportunity to meet with legislators, have lunch, and debrief.

The format of your meeting depends on the commitment of your attendees as well as your budget. Either format will offer your chapter a greater chance for a successful lobby day.

Transportation. Some organizations consider coordinating transportation for their members from around the state. This often involves carpooling or leasing of buses. For a larger event, it may be easier to coordinate bus pickups at a central location in a town or city, such as a hospital parking lot or other medical facility. For smaller events, it may be easier to leave it up to lobby day participants to make their own transportation arrangements.

Transportation is an important consideration for sponsoring a lobby day because the state capitols in many states are not centrally located and may become a challenge for recruiting members to participate.

In-District Meetings

The ACS strongly encourages chapters to include in-district meetings as part of their regular advocacy activities. In-district meetings are less formal and can be as simple as scheduling time to meet a legislator at a coffee shop, a legislator's district office, or at a surgeon's office.

While the chances of scheduling a meeting with the legislator are better with an in-district meeting, it will very likely be during the times when the legislature is out of session and not actively considering important legislative issues. This type of meeting is perfect for establishing relationships with legislators and conveying the importance of certain issues laying the groundwork for future legislation.

Virtual Legislative Meetings

The COVID-19 pandemic has upended some traditional advocacy activities such as lobby days with many state legislatures restricting access to state capital to visitors and large groups. The use of virtual meetings via Zoom or other video call services has become an accepted strategy for hosting a meeting between members and state legislators.

Hosting a virtual legislative meeting utilizes the same steps to organize such as recruiting surgeon participants, requesting and scheduling the meeting, preparing issue briefing materials. The difference is the use of a video meeting service and sharing the briefing materials with the legislator in advance of the meeting. A chapter can organize a “virtual lobby day” setting up multiple meetings on a specific day or rather can schedule individual meetings on different days prior to or during the legislative session.

Virtual legislative meetings are considered to be more flexible to schedule including when legislatures are in session and removes geographical restrictions that may preclude chapter members from participating in a meeting. Groups have begun using virtual meetings with members of Congress and their staff. **However, a legislator must be willing to participate in a virtual meeting.**

Key Considerations for Advocacy Meetings

Recruiting Surgeons to Participate

Important considerations for scheduling advocacy meetings are determining who and how many surgeons should participate. For a lobby day it is preferred to recruit a large number of participants so that you a strong representation from around the state to meet numerous legislators with anywhere from two to six people for each meeting. Conversely, an in-district meeting can include as few as one member, while a virtual meeting should be limited to avoid overwhelming attendees in the virtual setting.

The most effective participants will be people who can represent their communities, and those who may have ties to the representative or senator. If your chapter hopes to target a specific legislator, it is important to bring in surgeons from his or her district to attend the meeting. Also, the meeting may be a great opportunity to bring in other organizations that support the chapter on the issue being discussed. If there are members interested in participating but are unable to do so, ask them to write a letter that can be presented to their legislator or ask that they make a separate appointment for another time to meet with the legislator in a district office.

Scheduling Meetings. For each of the advocacy meeting types, it is important to

decide who will handle scheduling a meeting or meetings. Depending on available staff and resources, a chapter may take the lead reaching out to legislator offices to schedule on behalf of members, especially if more than one member will be participating. However, to facilitate the building of relationships, it is highly encouraged that members schedule their own meetings especially for in-district meetings. If members are planning to meet as a group, they should identify well in advance the person responsible for scheduling the meeting and sharing that information with other members.

For a virtual meeting, the chapter or a participant should supply the virtual meeting tool i.e. Zoom, etc. and ensure that the legislator or their staff has the correct information for them to be able to sign into the meeting.

During a lobby day, it is an option to “drop by” a legislator’s office for an impromptu meeting but the chances of meeting with them are much lower doing this. Also, while it is preferred to meet with a legislator, a meeting with the legislative aide is also very beneficial if the senator or representative is unavailable. The legislative staff are the ones compiling the information on an issue that informs a legislator’s decision on how to vote on a bill.

Legislative Visits. Best practice indicates that meetings should consist of two to six people. However, one participant is more than enough. It is important that at least one member of the group is a constituent of the legislator with whom the group is meeting. Legislators are more apt to take action on an issue when a voting constituent seeks assistance on an issue rather than a chapter member from outside of the district.

Note: When meeting with legislative leadership, such as the Senate President, Speaker of the House, or committee chairs, it is great to have a constituent in the group, but if one cannot be included then chapter leadership can adequately represent the chapter.

Typical meetings will last 15–20 minutes and may be longer if meeting with legislative staff. During the meeting, it is important that surgeons convey the position of the chapter in that short amount of time. Go to the meeting with specific items or actions that you want your representative or senator to work towards. Each meeting should have one surgeon (preferably a constituent of the legislator) take the lead and this individual should be well-versed on the issues and the legislator’s voting background on that particular issue.

Remind surgeons to not leave a meeting without asking the legislator to commit to the chapter’s legislative request. This “ASK” can be as simple as your representative voting “no” during a hearing or signing on as a cosponsor to a piece of legislation.

For virtual meetings, it is a good idea to have a meeting of the surgeon participants prior to meeting with the legislator to work out roles and responsibilities of each of the participants (see the included example meeting agenda).

For meetings in-person, it is appropriate to ask if a picture or two can be taken with the legislator. Following the meeting, the picture can be used along with an article in the chapter newsletter, providing a visual highlight of the lobby day and some positive public relations for the legislator.

BRIEFING MATERIALS

For Elected Officials/Staff. A personal meeting with a legislator is the perfect opportunity to educate your elected official about your profession and organization. You do not want to overwhelm the official but you do want him or her to leave the meeting with a better understanding of the chapter's issues, concerns, or legislative initiatives. A "leave behind" is the perfect way to provide your representative or their staff with follow-up information on your organization/issue.

For a virtual meeting, it is encouraged to send an electronic copy of the briefing materials to the legislator's office prior to the meeting so they have an opportunity to have the materials in front of them during the meeting.

A legislative packet should include the following:

- List of chapter staff with their contact information. If the legislator needs additional information on the issue or chapter, he or she will know whom to contact.
- Fact sheet on the surgical profession. Many people have a misperception of what surgeons really do and legislators may be no different.
- Letter from the executive director or president of your chapter that explains why your chapter supports or opposes the issue you will discuss.
- Fact sheet and information on the issue or specific legislation you will discuss.

For Surgeons. Members should receive the same information that the chapter intends to give the elected officials so they will be familiar with the materials. For a virtual meeting all participants should have a copy of the materials in advance of the meeting.

For a lobby day, other information you should provide to participants includes:

- Map of the capitol

- Appointment times, locations, and telephone number
- Talking points on the issues
- Tips for Effective Lobbying
- Evaluation form
- Follow-up form

LOBBY DAY WRAP-UP

Your members have come and gone and a successful lobby day has adjourned but there are still many tasks that need to be completed before a lobby day is truly over.

First, it is important to send thank you letters to chapter members who participated in the event and the legislators you met with. Each participant should be encouraged to send a personal thank you to the elected official or staff they visited. The chapter should also consider sending a thank you letter from the executive director or president on behalf of the organization to ensure that every elected official involved receives an acknowledgement.

Inform the overall chapter membership of your advocacy efforts on their behalf with an article in your chapter newsletter. The article could include the number of participants, legislative offices visited, the number of legislators that supported the issue, and the names of those legislators the chapter still needs to persuade. Pictures of legislators can highlight the notion of successful meetings with them. This is also an excellent time to encourage members to attend the next lobby day and become a part of the advocacy process.

Chapter leadership and staff should review and assess the lobby day and formulate a plan of action that will make the chapter more successful in future events. Evaluation comments from lobby day participants can provide keen insight into how well the event progressed; determine the value of briefing sessions and handouts; and highlight details requiring attention in the future.

Resources

Tips for Effective Advocacy Meeting

Prior to a legislative visit:

- Learn legislators' committee assignments and where their specialties lie as well as general biographical information, which can typically be found on their Web page
- Determine legislators' leadership roles within the legislature and their party caucuses
- Develop relationships with your legislators and their staff (in district if possible)
- Provide legislators and staff with preliminary information on potential issues for discussion, names and addresses of those participating in the visit, etc.

During a legislative visit:

- Introduce yourself.
- Start on a positive note by finding some common ground. For example, if your legislators recently voted in support of an ACS issue, thank them.
- Clearly describe the issue and the chapter's position. This is key if your meeting is cut short.
- Use personal anecdotes. Explain your position with facts and use personal stories when possible. State legislation affects you and your patients; make sure legislators understand the personal ramifications or benefits resulting from their actions.
- Focus on only a few issues to avoid overloading the legislator with too much information and keep the conversation simple and polite.
- If you don't understand something, ask for an explanation.
- Have the legislators clarify their position and/or vote on the issue.
- Show openness to the knowledge of counterarguments and politely respond to them if it seems appropriate to do so. Caution: Don't argue with the legislator or their staff.
- Firmly and fairly direct the conversation, especially if the conversation begins to veer off track.
- Ask the legislator to take some specific actions such as sponsoring a bill, voting for or against a pending measure, or meeting with your chapter.
- If you don't know the answer to a question, say so, but offer to get an answer.
- Express thanks as you leave.

After the Visit:

- Write a thank you letter summarizing your priority points.
- Share the results of your meetings with your chapter leadership, including

insights about legislators' concerns. Inform the chapter membership through the chapter newsletter or listserv and ask other Fellows to lobby.

- Maintain ongoing communication with legislators and their staff through letters, calls, and visits.
- Find out when legislators will be at home in the district and organize a local visit.

Sample Appointment Requests (Lobby Day Specific)

ACS has developed sample letters for setting up appointments with legislators. Whether the participants set their own appointments, or you decide to take on this task, legislators should receive an invitation from your organization regarding the meeting. This will alert them about the issues and allow you to give some of your organization's history. While lobby day specific, the following samples are easily edited for any type of meeting.

Best practice is to send an email and follow up with a phone call to the legislator's office to confirm they received it.

Chapter Scheduling Appointment

Dear (Senator or Representative):

The (Chapter Name) of the American College of Surgeons (ACS) will host its annual Lobby Day on (Date). Our members will be walking the halls of the Capitol to discuss the (Issue/Legislation), (give the status of the legislation and who is sponsoring it, if you have that information). This legislation would (Tell what the consequence or benefit of this legislation is to your member of the people you serve).

Surgeons from your district would like to meet with you or the appropriate staff member on (Date) at (Time) for 30 minutes to provide you with information on this important issue.

Obtaining your support on this legislation is critical to the surgery profession and specifically to (whomever this legislation would affect).

At this time, the following surgeons have indicated they will be in attendance:

(INSERT NAMES/ADDRESSES HERE)

Thank you for the opportunity to meet on (DATE). Should this meeting time need to be

revised, please contact me at XXX-XXX-XXXX or by e-mail atxxxxxxxxxx.

Sincerely,

Surgeon Scheduling Appointment

Dear (Senator or Representative):

The (Chapter Name) of the American College of Surgeons (ACS) will host its annual Lobby Day on (Date). Our members will be walking the halls of the Capitol to discuss the (Issue/Legislation), (give the status of the legislation and who is sponsoring it, if you have that information). This legislation would (Tell what the consequence or benefit of this legislation is to your member of the people you serve).

I would like to meet with you or the appropriate staff member on (Date) at (Time) for 30 minutes to provide you with information on this important issue. Obtaining your support on this legislation is critical to the surgical profession and specifically to (whomever this legislation would affect).

Thank you for the opportunity to meet on (DATE). Should this meeting time need to be revised, please contact me at XXX-XXX-XXXX or by e-mail atxxxxxxxxxx.

Sample Thank You/Follow Up

It is best practice to send a personalized thank you following your meeting. You can email or send a thank you letter. A handwritten thank you is also a nice personal touch.

Issue Specific Thank You

Dear (Senator or Representative):

Thank you for taking the time to meet with me on [DATE]. I enjoyed speaking with you about [INSERT ISSUE] and the essential benefits that surgeons provide within our community.

As a [specialty] and a member of the [STATE CHAPTER] of the American College of Surgeons, I ask you to [cosponsor, support, oppose, etc.] the [INSERT TITLE OF LEGISLATION] (H.B. XXXX and/or S.B. XXXX). As discussed during our initial

meeting, this important legislation would help ensure that [INSERT RELEVANT DATA OR TALKING POINTS]. In order to help provide patients with timely access to quality health care services, we believe that [INSERT POSITION].

I would be happy to provide additional follow up information if necessary.

Thank you again for all you do for surgeons and surgical patients.

Sincerely,

Simple Thank You

Dear (Senator or Representative):

Thank you for taking the time to meet with me on [DATE]. I enjoyed speaking with you about the essential benefits that surgeons provide within our community.

Please feel free to consider me as a resource and do not hesitate to reach out to me if you would like a surgical perspective on health care related policies.

Thank you again for all you do for surgeons and surgical patients.

Sincerely,

Sample Virtual Meeting Agenda



San Diego-Imperial Chapter American College of Surgeons

OFFICERS:
Jeanne Lee, MD FACS
PRESIDENT

Dianne Wintz, MD FACS
SECRETARY/TREASURER

COUNCILORS:
Steven Chen, MD FACS
Gilani Sapideh MD FACS

GOVERNORS:
Jay J Doucet MD FACS
Gail Tominaga, MD FACS

ASSOCIATION OF
WOMEN SURGEONS
REPRESENTATIVE:
Gilani Sapideh MD FACS:

CHAIR, SAN DIEGO-IMPERIAL
COMMITTEE ON TRAUMA:
Todd Costantini MD FACS

STATE CHAIR, ZONE X,
COMMISSION ON CANCER:
Ujwala Rajgopal, MD, FACS

CORRESPONDENCE &
EXECUTIVE DIRECTOR:
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<http://www.sdcacs.org/>
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<https://twitter.com/sdcacs>

Aug, 8, 2020

ACS San Diego - Imperial Chapter Advocacy Outreach

Senator Ben Hueso Zoom and Greet

8/04/2020

Participants:

Jay Doucet MD, FACS	Jeanne Lee MD, FACS
Gail Tominaga MD, FACS	Jessica Weaver MD
Laura Godat MD, FACS	Sara Higginson MD
Diane Wintz MD, FACS	Allison Berndtson MD, FACS
Amy E. Liepert MD, FACS	Todd Costantini MD, FACS
Leslie Kobayashi MD, FACS	

Objectives of the Chapter: "To elevate the standards of surgery, establish a standard of competency and of character for practitioners of surgery, and to educate the public and the profession."

6:00pm: Welcome and Introductions

6:05: Topics Presentations:

Trauma System & EMS San Diego Co. – Jay Doucet

Stop the Bleed – Todd Costantini

Border Related: Trauma, EGS, COVID – Allison Berndtson

Burn Treatment – Jeanne Lee

Education Programs – Laura Godat

Misc. and Coronado Suicide Bridge Project – Amy Liepert

6:35: Questions/Discussion/Open Forum

6:45: Adjourn

cc. ACS State Legislative Office