

“White Coat Day” Advocacy Tool Kit

Ohio Foot and Ankle Medical Association

Background

The Ohio Foot and Ankle Medical Association (OHFAMA) has made significant strides in protecting our patients by educating lawmakers, at the state and federal levels, about the importance of considering podiatric medicine in health care policy discussions and legislation. While we continue to visit with Legislators in Columbus, our work is many times more powerful when legislators and their staff can link the policies we lobby for to their local constituents.

This is the simple basis for your local White Coat Day (clinic tour) – building quality relationships with policymakers so that we have a louder voice when we advocate on behalf of our patients and their health care. To do this, it is important that legislators and their staff see, first hand, the important work that you do in your offices every day. The relationships you build will benefit you down the road and lead to powerful political capital we can use in the future. With Ohio’s term limits, State Legislators are often the next Congressional and Senatorial candidates at the Federal level!

The principle purposes of a clinic tour are three-fold:

- To educate legislators and their staff about your achievements and challenges;
- To establish or strengthen communication between legislator’s office and your own health care practice; and
- To establish or enhance a personal relationship among the legislator, his/her staff and your practice.

This Tool Kit includes sample letters, scripts, and tip sheets on how to set up your very own White Coat Day!

Tool Kit Content

- Tip Sheet: Planning for your clinic tour
- Sample clinic tour agenda
- Tip Sheet: Making the invitation
- Sample letter: Making the invitation
- Tip Sheet: Prepare for the visit
- Tip Sheet: Clinic tour follow-up
- Clinic Tour Checklist

Remember that these resources are only guides and we encourage you to personalize them to increase their effectiveness.

Planning for your Clinic Tour

Tip Sheet

It is important for you to plan your goals and objectives before you make the request to have a legislator and/or their staff visit your clinic. Once you've decided to go ahead with your visit:

- Let OHFAMA staff know of your intentions to host a legislative visit. Depending on the occasion, OHFAMA staff can help target the issues for discussion, provide information about the legislator before you meet, and help with materials;
- Remember your goals for the clinic tour:
 - To educate legislators and their staffs about your achievements and challenges;
 - To establish or strengthen communication between legislator's office and your own health care practice; and
 - To establish or enhance a personal relationship among the legislator, his/her staff and your practice.
- **KEY NOTE: If you prefer to discuss pressing issues, (existing legislation or specific policy issues) it is better to ask for a meeting at the legislator's office. Since our goals include building a strong relationship, a more relaxed, social and informative meeting (tour) at your offices are appropriate.**

Plan your tour:

- Sit down with your office staff and brief them prior to the visit – get them excited about it!
- Find a 'hook' for the invitation such as:
 - An opportunity to meet new constituents
 - Take a tour of your offices and learn how important foot and ankle care is to their constituents;
 - Have their photo taken for your patient newsletter (which reaches XXX people per year);
 - present an award to your legislator; and
 - ...many other creative ideas.
- Work with OHFAMA to put together a packet of information for your legislator and their staff including:
 - Details about your practice (this can be existing marketing materials);
 - Podiatric healthcare issues facing the constituents;
 - Public policy issues affecting Podiatric health care; and
 - Information about OHFAMA.
- Put together a loose agenda for the visit. See attached sample Clinic Tour Agenda
- Plan on and decide upon two or three main points you would like the legislator to walk away with and incorporate them into the tour

Clinic Tour Agenda

Sample

Approximately 1 hour and 30 minutes

Pre-meeting (30 minutes)

- Everyone who participates should be briefed on the visit and its purpose;
- Assign important talking points to you and your staff conducting the tour;
- The tour route and participants should be determined before the legislator arrives;

Welcome and Introduction (10 minutes)

- Staff welcome legislator
- Photographs taken

Clinic Tour (40 minutes)

- Take your time – do not rush
- **KEY NOTE: Suggested tour highlights include advanced technological equipment, with an emphasis on the medical and cost-saving benefits; humanistic services such as community outreach; and any service or aspect unique to your practice;**
- This is a good time to provide information such as the number of patients you see and the types of health issues they face; and
- Allow the legislator to be curious and ask questions.

Thank you and conclusion (10 minutes)

- Thank the legislator for their time;
- Give low-dollar value gift (OHFAMA scrub top, etc...); and
- Make sure to give the legislator your business card and make sure that he or she and their staff have the printed materials you gave them earlier.

Making the Invitation

Tip Sheet

1. Begin planning for your visit at least two months in advance
 - a. Talk with OHFAMA to identify priority legislators and get any pertinent background about your legislator's voting history; check our Web site at www.ohfama.org under Advocacy – Call to Action and reference on on-line software, Voter Voice to read information on your legislator, their committees, etc.
2. Know when your representatives will be 'in district' and therefore more likely to attend and more available to you;
 - a. Identify a few dates/days of the week that would work for a visit to your clinic. Consider the following about your legislator's availability when making your request:
 - i. The legislature operates from XXXXXXXXXX to XXXXXXXXXX
 - ii. Legislators are usually 'in district' on XXXXXXXXX
 - iii. Find out when your legislator is up for re-election – this may be a good incentive for their visit, but can prompt other scheduling problems.
3. Identify your targeted legislators:
 - a. Search by entering your zip code at the following sites for the Ohio House of Representatives and Senate (respectively)
 - i. www.house.state.oh.us/
 - ii. <http://www.senate.state.oh.us/senators/SenateZipSearch.html>
 - b. Familiarize yourself with your legislator's biography, interests, and committee assignments
 - c. **KEY NOTE: Since you are requesting a visit in their District, you will need to contact your legislator's District Office to schedule the visit;**
4. Remember that each legislator has staff that she or he relies on:
 - a. Request the presence of your Legislator's District Director and/or health policy advisor;
 - b. If the legislator cannot meet with you, it is sometimes as valuable to meet with their staff.
 - c. **KEY NOTE: Building relationships with district staff is just as important as the relationship with the legislator because they are often more accessible to you.**
5. Send a letter (see the sample, attached) requesting the visit
 - a. If you don't already know, call to identify to whom your request should be addressed (all this information is on our Web site under Advocacy;
 - b. Personalize the letter
 - c. **KEY NOTE: Personalize the letter by letting their office know how many of their constituents you see per month. Put yourself in the legislator's shoes and let them know why it's so important that they visit your clinic.**
6. Follow up your letter with a phone call in about a week to ensure that they received it (see attached sample script)
7. **KEY NOTE: It's up to you to communicate exactly how important podiatric health is to constituents in your legislator's district. The key is helping the legislator and staff understand why this matters to THEM and their office.**
8. Contact their office one week prior to the event to confirm.

Clinic Tour Request

Sample Letter

[YOUR STREET ADDRESS]
[YOUR CITY, STATE, ZIP]

[SCHEDULER'S NAME]
[ELECTED OFFICIAL'S NAME]
[ADDRESS or FAX]

[DATE]

Dear [SCHEDULER'S NAME]:

With health care such a high priority this year, we would like to extend an invitation to [ELECTED OFFICIAL'S NAME] to visit our Podiatric Foot and Ankle clinic [CLINIC NAME].

INSERT THE SHORT DESCRIPTION OF YOUR CLINIC.

We welcome the opportunity to have you visit us, see our clinic, visit with your constituents, and [INSERT YOUR OWN GOAL/PURPOSE HERE]. I realize your schedule is extremely hectic, but I will gladly work to find a time that's best for you. If you are unable to join us, please direct us to a staff member who might be able to visit our offices and learn more about the importance of Foot and Ankle Specialist care for constituents in your District.

Will you please contact me at [PHONE #] or [E-MAIL] to confirm a meeting time?

Thank you for your consideration and we will be contacting your office shortly to follow up.

Sincerely yours,

[YOUR NAME]

During Your Clinic Tour

Tip Sheet

- Take your time and make the legislator and/or their staff comfortable;
- Listen to the Legislator and ask questions;
- If the participants ask questions that you don't know the answer to, offer to find out and get back to them;
- Incorporate some of the Legislator's priority areas into your discussions when possible;
- Use stories - in addition to facts and figures – that emphasize the importance of Foot and Ankle Care to his or her constituents
- Show off advanced technological equipment, with an emphasis on the medical and cost-saving benefits;
- Talk about the range of services you provide – especially any service or aspect unique to your practice;
- Mention how many patients you see per week in your Offices;
- Talk about any volunteer or humanistic services such as community outreach that you provide;
- If you intend to introduce tour participants to patients, ensure that HIPPA requirements are met:
 - Call patients in advance to give them the option of rescheduling if they're uncomfortable; &
 - If patients are included in any photography, make sure that you get a signed release;
- Meet-and-greets in your patient lobby work well;
- **KEY NOTE: Emphasize your connection to OHFAMA and the APMA so that the legislator is well aware that you are part of an organized effort – they keep this in mind later when you ask for something specific;**
- Assign a staff person to take pictures of the visit and make sure you offer the legislator and/or their staff copies;
- Assign a staff person to take some brief notes so that you can brief OHFAMA staff about your visit.
- **Potential Key Talking Points:**
 - We want to ensure access to podiatric care for your constituents;
 - Appropriate preventative foot and ankle care prevents lower extremity amputations and saves lives as well as health care dollars
 - Podiatry is often overlooked when legislators make health care policy;
 - Access to foot and ankle care leads to future health care cost savings;
 - We hope that you will keep our services in mind when you're making and voting on health care policy in the future;

Clinic Tour Follow Up

Tip Sheet

- Send a personal thank you to each of the staff and legislator who attended the visit including copies of any photographs taken;
- If you are taking pictures for your newsletter, make sure that you send multiple copies to both their District and Capitol offices;
- Legislators often have e-newsletters and are happy to publish a picture of the legislator in action, along with an article, if you provide it to them;
- Make sure to send a thank you to the scheduling secretary (if applicable);
- Discuss the results of your visit to OHFAMA.

Legislative Visit Checklist

- Talk with OHFAMA about your interest in hosting a clinic tour
- Pick a range of date(s) for your clinic tour
- Prepare yourself by reading through the legislator's biography, areas of interest, and committee assignments. OHFAMA can also help with this.
- Plan for tour: choose "hook" and activities
- Mail invitation
- Call to follow up on invitation
- Prepare office for visit (e.g. a welcome sign, snacks and water, etc...)
- Draw up simple agenda
- Work with OHFAMA to prepare packet of materials for the legislator and their staff
- Exchange business cards with all attendees
- Follow up with the legislator's office on any information you agreed to "get back to them" with;
- Send thank you notes and pictures
- Debrief with OHFAMA