



*Office of state Government Affairs*

# Chapter Advocacy Roundtable Guide

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## HIMSS Chapter Advocacy Roundtable Guide An Introduction

*Advocacy: “ability to plead in favor of; support or urge by argument; recommend publicly”*

### Purpose

The HIMSS Chapter Advocacy Roundtable Guide outlines:

- a) The role state and local HIMSS chapters can play to further HIMSS’ national policy objectives and advocacy activities.
- b) The role state and local HIMSS chapters can play to influence state-level legislation and regulatory issues.

This guide also provides a starter set of suggested activities and tool sets to support these objectives.

### Background

Historically, HIMSS provided its Members with forums for learning and networking. In the mid-1990s because of activity related to the implementation of the Health Insurance Portability and Accountability Act (HIPAA) legislation. HIMSS recognized the important role advocacy could play in affecting public policy. Based on this experience and the increased attention by policymakers on technology in health care, HIMSS decided to form an Advocacy Task Force in 1998. The task force was comprised of HIMSS Members and charged with defining the role that HIMSS would play in the public policy arena. Based on recommendations from the task force, HIMSS launched its Advocacy Steering Committee in 2000.

In 2002, HIMSS committed additional resources to advocacy outreach by hiring Dave Roberts, FHIMSS, as its Director of Public Policy and staff liaison to the Advocacy Steering Committee. Today, Dave Roberts serves as VP of Government Relations. Soon after, HIMSS opened an office in the Washington, D.C. area. In 2003, HIMSS hired former congressional staff member Tom Leary as Director of Federal Affairs. In October 2005, Tom Keefe, former Deputy Assistant Secretary at the Department of Labor was hired as Director of State Government Relations.

As of July 2010, the Government Relations team of the Washington office has grown to a staff that is working with national and state government officials. Today, national policy makers recognize HIMSS as a reliable source of information about the healthcare industry and the role technology, and particularly information systems technology, plays in the delivery and management of patient care.

## Chapter Advocacy Roundtable (CAR) Program

With the 47 chapters in the United States, one of HIMSS' many strengths is to connect HIMSS members with state, regional and national decision-makers on key health IT issues. Launched in April 2004, HIMSS' Chapter Advocacy program provides an opportunity for each HIMSS chapter to elect or appoint one or more members to serve in the Chapter Board level position of Chapter Advocate. Chapter Advocates and other volunteers participate collectively in the Chapter Advocacy Roundtable. For FY 2011, Martha Dameron of the Northern California Chapter was appointed Chair. Serving as Vice Chairs are David Cheli, Midwest Gateway Chapter; Terri Ripley, Virginia Chapter; Sharon Davis, Dallas/Fort Worth Chapter and Liddy West of the Arizona Chapter.

Throughout the United States today, over 50 HIMSS Chapter Advocates are engaged with planning and facilitating advocacy and public policy activities within their local chapters. Once a year, Chapter Advocates have an opportunity to visit Washington, D.C. to attend an off-site training seminar and participate in HIMSS National Advocacy Day on Capitol Hill. The advocacy activities conducted by chapters and Chapter Advocates, is celebrated through the Chapter Advocacy Recognition Program.

All Chapter Advocates are actively engaged in the Chapter Advocacy Roundtable (CAR). Conducted through monthly conference call meetings, the CAR provides a networking and educational opportunity for Chapter Advocates to promote chapter level advocacy programs at the grassroots level in coordination with the HIMSS advocacy and public policy Board-approved agenda.

For more information on Chapter Advocates and the Chapter Advocacy Roundtable, please contact HIMSS Regional Affairs Coordinator of State Government Affairs, Jessica Martin at [jmartin@himss.org](mailto:jmartin@himss.org).

### *What does it mean to be a Chapter Advocate?*

To advocate on behalf of your organization and community about issues important to furthering health IT policy and legislative agendas.

Responsibilities:

- Work with HIMSS Chapter Advocacy Roundtable and/committee members to create an advocacy action plan specific to your community.
- Keep members of your Board informed about campaign efforts.
- Recruit Chapter volunteers and other community leaders to join the campaign.
- Organize visits and other avenues of frequent communication with regional, state and federal elected officials.
- Speak to local media about key policy and advocacy issues.
- Attend HIMSS-sponsored advocacy training and message development sessions.

*Who are your HIMSS Advocates who would be glad to support you in your advocacy efforts?*

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## Chapter Advocacy Roundtable Membership



- ★ Chair, Martha Dameron of the Northern California Chapter
  - ★ Dave Cheli, Vice Chair of Midwest Region (1)
  - ★ Sharon Davis, Vice Chair of Southern Region (3)
- ★ Terri Ripley, Vice Chair of Eastern Region (2)
  - ★ Liddy West, Vice Chair of West Region (4)

## CAR Recognition Program

There are two ways in which a Chapter Advocate can be recognized for their advocacy efforts on a Calendar Year basis through the CAR Recognition Program:

1. Achieving a Advocate, Ambassador or Presidential Level of Recognition
2. Being named the *Chapter Advocate of the Year*

### Achieving a Advocate, Ambassador or Presidential Level of Recognition

At the end of each calendar year, Chapter Advocates' advocacy efforts will be evaluated. Those who meet the criteria below will be awarded a Level of Advocacy Award accordingly. Recognition pins and certificates will be awarded to each Chapter Advocate during the Annual CAR off site training.

Additionally, once a Chapter Advocate reaches a Recognition Level, their respective Chapter also reaches this Recognition Level.

Recognition Levels	How to reach
Presidential	Attend 9-12 monthly calls and complete 9-12 monthly tasks
Ambassador	Attend 6-9 monthly calls and complete 6-9 monthly tasks
Advocate	Attend 3-5 monthly calls and complete 3-5 monthly tasks



### CAR of the Year

CAR of The Year is awarded to the Chapter Advocate who accumulates the most points throughout the Calendar Year. The Chapter Advocate who is awarded CAR of The Year receives a full scholarship to HIMSS Annual Conference and is recognized at its Public Policy breakfast.

### **How to Track Your Points**

Chapter Advocates are responsible for keeping track of and logging their points throughout the year. Chapter Advocates can log their points by completing a monthly survey posted on the [State Government Affairs SharePoint site](#) each month.

### Recognition Point System

<b>Task</b>	<b>Points</b>
Participate in the Monthly CAR Conference Call	1
Attend a HIMSS policy webcast	1
Facilitate a presentation at a local HIMSS Chapter meeting	1
Posting HIMSS advocacy events posted to Chapter website	1
Accomplish other assigned monthly task	1
Form an active Chapter Advocacy Committee with greater than 2 CARs	2
Have a State Official sign up for HIMSS State officials membership	2
One on One local site visit with a Legislator	3
Plan and attend a local/regional HIT policy event	3
Help plan a HIMSS Chapter sponsored State Advocacy or HIT day	4
Invite and Escort a State Official to a Chapter event	4
Work with the local HIMSS chapter to host a State HIT day on Capitol Hill in Washington, D.C.	5
Attend HIMSS National Conference and Public Policy breakfast	5

## HIMSS Advocacy and Public Policy

**OVERVIEW:** HIMSS advocacy and public policy efforts drive needed changes at the federal and state levels to improve healthcare. HIMSS members who are both experienced and novice, yet passionate about advocacy, lead these efforts. HIMSS mobilizes its members and seeks to perform multiple levels of advocacy activities through a variety of initiatives. In addition, HIMSS works closely with key federal decision-makers and the U.S. House of Representatives' 21<sup>st</sup> Century Health Care Caucus and the Senate Health Care Quality Improvement and Information Technology Caucus to advance improvements in the quality, safety and efficiency of healthcare through the use of information technology and management systems. HIMSS' primary advocacy focus is to provide leadership and industry direction on healthcare issues and policy in order to remove barriers and enable implementation of solutions.

**HISTORY:** HIMSS Office of Advocacy and Public Policy was founded in February 2000 and focuses on expanding the organization's visibility on Capitol Hill, in the Administration and state legislatures, and works with all interested stakeholders including individual members, corporations, and collaborating organizations to coordinate and advance healthcare IT and management systems through advocacy and public policy initiatives.

**CORPORATE MEMBER ADVOCACY:** HIMSS Government Relations Roundtable (HGRR) was established in 2002 and HGRR membership is open to representatives of all HIMSS Diamond corporate members and federal government representatives who want to network with and access key federal decision makers on national topics. Members usually meet monthly in Washington, D.C. and via teleconference.

**CHAPTER LEVEL ADVOCACY:** The Chapter Advocacy Roundtable (CAR) was established in 2003 and is composed of advocates from each of HIMSS 47 Chapters whose goal is to expand HIMSS advocacy efforts at the grassroots level. Members are selected by their home chapter and meet monthly via teleconference.

**HIMSS VISION:** Advancing the best use of information and management systems for the betterment of health care.

**HIMSS MISSION:** To lead healthcare transformation through the effective use of health information technology.

## HIMSS Advocacy Goals and Objectives

### Goal

*National healthcare regulations and policies will reflect the expertise and knowledge of healthcare information and management systems professionals to frame and lead healthcare legislation, regulations, policies, standards, and practices.*

### Objectives

- Provide leadership and direction on healthcare issues and policy related to healthcare information and management systems.
- Achieve recognition as the organization of expertise in healthcare information and management systems policy
- Encourage industry and government to embrace and incorporate the best use of information and management systems to improve the efficiency and quality of healthcare delivery

### How HIMSS Takes Action

HIMSS engages the Policy Steering Committee, Government Relations Roundtable, Task Forces, Work Groups, Special Interest Groups (SIGs), and other subject matter experts to process issues and develop position statements, which are presented to the HIMSS Board of Directors for approval.

Once policy positions are formulated, HIMSS utilizes several forums to communicate and advocate its positions. The goal is to advocate these positions with the appropriate people, in effective venues, via various membership contacts and dedicated professional D.C. staff.

It is the responsibility of HIMSS' Vice President of Government Relations, working with HIMSS' committees, to develop legislative strategies to address each of HIMSS' public policy priorities. At the federal level, decision-makers such as members of Congress, key influencers such as congressional staff, and key regulators (e.g., Centers for Medicare and Medicaid Services) receive information that affects their decisions about policy, rules and regulations from several sources, including:

- Lobbyists
- National associations
- Policy think tanks
- Industry experts

## **“All politics is local”**

*Thomas “Tip” O’Neil, former Speaker of the US House of Representatives*

In addition to receiving information from those listed, members of Congress are also interested in the views of their constituents. Congressional members, though working in the Capitol, are very aware they must be responsive to their constituents concerns in their home districts.

Therefore, HIMSS and its local advocacy initiatives will benefit from having ready access to local relationships and local perspective on issues. This can be best be accomplished by having well informed and prepared Chapters.

### **How HIMSS Prepares Chapters**

HIMSS is the healthcare industry’s membership organization exclusively focused on providing leadership for the optimal use of healthcare information technology and management systems for the betterment of human health. Chapters of HIMSS are “staffed” by unpaid member volunteers. The strength of these chapters varies by state. In order for the chapters to be valuable contributors to a national advocacy action network, they will need information and support in organizing themselves from the HIMSS national office.

### ***Information HIMSS Will Provide State / Local Chapters***

- **Federal legislative agenda with key messages and talking points. HIMSS provides this in various formats including:**
  - [HIMSS Principles on Government Initiatives](#)
  - [Health IT Policy Update \(weekly\)](#)
  - [Federal Legislation Crosswalk](#)
  - [Legislative Action Center](#)
  - [HIMSS Weekly Insider](#)
  - [HIMSS Blog](#)
  - Internet communications (call for action)
  - Annual Advocacy Agenda
  
- **State legislative agenda with key messages and talking points. HIMSS will provide this to the chapters through:**
  - HIMSS State Dashboard
  - Chapter Advocacy Roundtable (CAR)

## How Chapters Support National Advocacy Strategy

At the state and local levels, chapters will need to clearly define the role of the **Chapter Advocacy Roundtable Member**. The conduct of this role will vary among the states based on local membership and volunteer capabilities. The HIMSS leadership of the CAR and the HIMSS Regional Affairs team will work with each Chapter to develop this position and will support the Chapter Advocacy Roundtable in a number of ways, including monthly CAR conference calls. The responsibilities of this role should minimally include:

### **Structure**

- Developing a structure to manage the responsibilities outlined below. These responsibilities might reside with an individual or with a committee.

### **Information**

- Participating in monthly HIMSS Chapter Advocacy Roundtable monthly meetings.
- Encouraging state/local chapter members in developing relationships with their Congressional Members, state and local elected officials and staff.
- Disseminating legislative updates and other related information provided by HIMSS Policy Committee's Outreach Work Group and HIMSS Senior Director of State Government Relations to state/local chapter members.
- Developing relationships with key chapter members (ex. Chapter President and other chapter leaders). These relationships are important when members are called to action. The most influential chapter members should be familiar with the Chapter Advocacy Roundtable (CAR) representative and the role that position plays within HIMSS
- Developing relationships with the staffs of state and local associations that might have similar policy/ legislative priorities (e.g., hospital, medical, software, HFMA, etc.) These relationships are important for several reasons. One, often HIMSS members are members of other trade associations. Developing shared messages and coordinating the use of shared members will help avoid overwhelming our "shared" influential members. Second, many of the trade associations have paid staff and political relationships that could help bolster visibility of shared issues with key decision-makers
- When requested by HIMSS staff, contacting local HIMSS members and asking them to initiate a communications/education campaign with their congressional representatives.

## How Chapters Support State-Level Advocacy Strategy

If a state or local chapter has sufficient resources, the chapter should consider developing a state-level advocacy program. The advocacy activities of the **Chapter Advocacy Roundtable Representative** in this model expands to support both HIMSS national policy agenda and to tackle state or region-specific public policy and regulatory issues.

**Type of person that can fill this position:**

- A passionate member that wants to be a part of HIT advocacy initiatives and is interested in government relations.
- Someone to lead and direct healthcare legislative, regulatory, and policy initiatives for their Chapter.
- Someone that wants their voice heard.

**Roles & Responsibilities:**

- Work with HIMSS Chapter Advocacy Roundtable and/committee members to create an advocacy action plan specific to your community.
- Participate in a monthly conference call to discuss current advocacy initiatives and provide feedback from local efforts
- Keep members of your Board informed about campaign efforts.
- Recruit Chapter volunteers and other community leaders to join the campaign.
- Organize visits and other avenues of frequent communication with state and federal elected officials.
- Speak to local media about key policy and advocacy issues.
- Attend HIMSS-sponsored advocacy training and message development sessions.

To initiate a state-level advocacy program, the state/local chapter will need to do the following in addition to the things discussed above:

- Lead the chapter in developing and maintaining relationships with state elected officials.
- Communicate the Society's vision, mission, and priorities to state and local policy makers.
- Educate elected officials, policy makers and their staff about key healthcare information technology issues.
- Promote opportunities to influence state regulatory and legislative issues.
- Serve as a liaison between HIMSS and state government agencies that relate to mission.
- Encourage chapter members to contact their elected official on issues of import to the Society.
- Coordinate at least one advocacy related Chapter program per year.
- Develop state-level strategies to support HIMSS' policy and legislative priorities.
- Define state-specific public policy objectives and strategies to address each objective.
- Work with HIMSS State Government Affairs staff and the Regional Affairs team staff to develop information necessary to educate state and local officials on healthcare information issues.

The time required to successfully manage the responsibilities of this role will depend on numerous factors including:

- Time, capabilities and connections of Chapter Advocacy Roundtable representative and committee members.
- The information and support provided by HIMSS national staff and Policy Steering Committee.
- The issues before the state's legislature and within its regulatory agencies.
- The frequency and duration of the state's legislative session.

## Tools Helping Chapter Advocates Stay Connected

1. [HIMSS State Government Affairs on SharePoint](#). A site created especially for Chapter Advocates to stay connected with HIMSS and each other. Includes posting on relevant announcements and documents pertaining to the CAR.
2. [Legislative Action Center](#). An electronic tool launched in 2003 for all HIMSS members to research, educate and communicate with federal officials. This tool is updated daily and was awarded the 2005 American Society for Association Executives (ASAE) National Award for Citizenship and Democracy.
3. [HIMSS State Dashboard](#). The premier resource of today's healthcare Information technology initiatives around the United States! The Dashboard provides an easy-to-read visual interface tracking key initiatives including Regional Extension Centers, HIMSS Davies Award recipients, Health Information Exchanges, State Legislation and HIMSS Chapters.
4. [CQ State Track](#). CARs are able to identify and track pertinent state legislation through CQ State Track. CQ State Track also alerts CARs when target legislation requires their attention. Please contact [Jessica Martin, Regional Affairs Coordinator for State Government Affairs](#) to register and learn more about TrendTrack.
5. [Health IT Policy Update](#). Distributed via e-mail and published every Friday on the HIMSS Web site, Health IT Policy Update is packed with detailed analysis of the latest news surrounding the economic recovery bill; healthcare reform; initiatives and announcements from federal departments; and the Society's role in transforming the healthcare industry.
6. [HIMSS Principles on Government Initiatives](#). HIMSS Congressional Affairs team is to support the organization and its chapters by building relationships with members of Congress and their staff, providing them with accurate information about health information technology and management systems in order to help them make effective public policy decisions. This mission is achieved through representation of HIMSS Principles on Government Initiatives, and current needs and interests.
7. [HIMSS Advocacy and Public Policy Center](#). The one-stop site for all your advocacy needs.
8. [Visit HIMSS Washington Office](#). Visit us at 4300 Wilson Blvd, Suite 250 in Arlington, Virginia, to meet all HIMSS members' advocacy needs. If you're planning a trip to Washington, D.C., or need advocacy support, just contact the office at 703-562-8800.

## The Legislative Process

There are several stages in the legislative process where grassroots advocacy efforts can impact the outcome. The following pages outline in narrative and diagrammatic form the process by which a bill becomes law. An exception is the budget process: legislation affecting many areas may be packaged into a massive budget reconciliation bill to meet budget goals. A budget process diagram also follows.

**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 representative or senator. Obtaining a large number of co-sponsors on a bill is one strategy for gaining attention and credibility for an issue.

**Subcommittee-** The most important time for constituent involvement is the subcommittee stage. Legislators are not yet committed to specific bills or 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.

**Committee-** Grassroots advocacy at the committee stage is also very important. 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 representatives and senators is important when it comes to the floor 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-** Opportunities for grassroots impact are more limited at the conference stage. The Conference Committee works 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.

**Floor-** Once a conference committee has worked out the differences between the House and Senate version of a bill, floor passage is normally routine and not impacted by further constituent communication.

## Federal Legislative Terms Glossary

**Act-** A bill after it has passed either the House or Senate or been enacted into law

**Amendment-** A change of 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.

**Bill-** A proposed law.

**Budget-** The president's annual proposal to Congress, usually submitted in January, for federal expenditures and revenues for the coming fiscal year (which starts October 1)

**Budget Authority-** Allows the federal government to incur a financial liability, typically a contract for direct payment, a loan, or a loan guarantee.

**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 difference between House and Senate-passed versions of the same legislation.

**Conferees-** Senators and representatives appointed to serve on the conference committee.

**Co-sponsor** - One of 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 increases a bill's chances for consideration.

**Fiscal Year-** The federal government's fiscal year runs from October 1<sup>st</sup> through September 30<sup>th</sup>.

**Hearing-** Meeting of committees or subcommittees to gather information on the ramifications of proposed legislation, investigate problems or explore issues. Witnesses present testimony and answer questions.

**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-** Following 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.

**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

## Who's Who on Capitol Hill

### **Administrative Assistant (AA) or Chief of Staff**

The AA reports directly to the representative or senator, and usually is responsible for evaluating the political outcomes of various legislative proposals and constituent requests. The AA or chief of staff usually handles the overall office operations, including the assignment of work and the supervision of key staff.

### **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.

### **Legislative Assistant (LA)**

In most congressional offices, there are several legislative assistants and responsibilities are assigned to staff with particular expertise in specific areas. For example, depending on the responsibilities and interests of the member, an office may include a different LA for health issues, environment matters, taxes, 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.

### **Legislative Director (LD), Senior Legislative Assistant, or Legislative Coordinator**

The legislative director is usually the staff person who monitors the legislative schedule and makes recommendations regarding the pros and cons of particular issues.

### **Press Secretary or Communications Director**

The press secretary's responsibility is to build and maintain open and effective lines of communication between the member, his/her constituency, and the general public. The press secretary is expected to know the benefits, demands, and special requirements of both print and electronic media, and how to most effectively promote the members' view or positions on specific issues.

### **Scheduler, Appointments Secretary or Personal Secretary**

The scheduler is usually responsible for allocating a legislator's time among the many demands that arise from congressional responsibilities, staff requirements, and constituent requests. The appointment secretary may also be responsible for making necessary travel arrangements, arranging speaking dates, visits to the district, etc