



**OFFICE OF STATE  
GOVERNMENT AFFAIRS**

**State HealthIT Day**

**Planning Manual**

**Tom Keefe**  
Senior Director  
State Government Affairs  
703/562-8813  
[tkeefe@himss.org](mailto:tkeefe@himss.org)

**Jessica Martin**  
Coordinator  
State Government Affairs  
703/562-8819  
[jmartin@himss.org](mailto:jmartin@himss.org)



Dear HIMSS Advocate:

HIMSS Regional Affairs grassroots education and advocacy program mobilizes support for the improved use of health information technology and management systems for improved healthcare and patient delivery. This State Health IT Day Manual provides HIMSS advocates and volunteers with resources and tools to plan annual HealthIT Days with state elected officials as well as other government officials.

We advocate because the democratic political process of the United States is one in which the policies should represent the views of its citizens. Our elected officials are employed by their constituents and can only retain their jobs with the approval of the electorate. Therefore, you have a great deal of power and an enormous responsibility to your profession as well as your community.

Everyone can do it. Please forget the perception that you must be a high paid lobbyist to advocate for your issues. It is more important to be educated on the issues and to have anecdotal practical experience to share with government officials. We need your voice not your title in state capitals and legislatures across the country.

The use of this HIMSS State Health IT Day Planning Manual will provide the guidance and information you need to plan an effective Advocacy Day. Please read it in its entirety and contact [me](#) or [Jessica Martin](#), Coordinator, Regional Affairs, should you need additional information and/or assistance. We can also be reached on 703/562-8813 or 8819, respectively. I look forward to working with you to plan a successful State HealthIT Day!

Sincerely,

A handwritten signature in black ink that reads "Tom S. Keefe".

Tom Keefe  
Senior Director,

## **Table of Contents**

### **An Introduction to Advocacy and Grassroots Mobilization**

### **Planning Your State HealthIT Day**

### **Publicity and Promotion**

- Web site
- Chapter Publicity
- Working with the Media
- Utilizing Social Media

### **The Day of the Event**

- Set-up
- Signage
- Day of Event Checklist
- Media Coverage

### **Appendix**

- Sample Planning Timeline
- Tips for Successful Advocacy Meetings
- Sample Scheduling Letter (Meeting Request)
- Scheduling a Visit with Your Elected Official
- Sample Letter - Keynote Speaker
- Sample Letter - Requesting Proclamation
- Sample Marketing Email
- Sample Marketing Email (Last Chance to Pre-Register)
- Web site Copy
- Sample Press Release
- Sample Agenda
- Sample Virtual March Letter
- Sample Virtual March Letter/HIMSS Legislative Action Center
- Legislative Meeting Report Form
- Post-Meeting Checklist

## An Introduction to Advocacy and Grassroots Mobilization

In this manual, we view advocacy as one of the important elements or components of HIMSS Regional Affairs. We define advocacy as follows:

- It is the organization of information into arguments used to persuade an audience towards some attitude and predisposition to action.
- It is the act of persuading people using either verbal or nonverbal, and oral or visual communication to bring about their voluntary change in judgment, so that they will support a cause and adhere to a belief they may not have held before.

As an element of social mobilization, the end results of our work as frontline advocates are policies that protect, promote and sustain the use of healthcare information technology and management systems

### Why is there a need for advocacy?

There are more serious economic, social, cultural and political threats facing healthcare today than ever. America's families cannot defend themselves from these threats. We need individuals and institutions that have the best interests of healthcare and knowledge of the use of healthcare IT and management systems to transform healthcare to stand in their behalf. We need short- and long-term planning and changes in policies and laws. The end-results of advocacy are public policies, including laws.

### Who are our frontline advocates?

Any member of HIMSS can be an advocate. What is essential is that he or she has the best interests of healthcare IT and management systems at heart.

### As HIMSS advocates, what qualities are important to become effective?

**Commitment.** We must see our responsibilities not merely as part of our eight-hour work. We have to be dedicated and committed to the cause—the transformation of healthcare through information technology and managements systems. We must be energized by our desire to help and serve and be challenged by problems and constraints we face.

**Effective Managers.** We must be aware of the situation of healthcare and healthcare IT in our area. We must set definite objectives. We must plan our strategies and activities based on the best use of the resources available. We must organize Advocacy events towards achieving the shared goal of a better quality of health and healthcare for all Americans. We must monitor and

evaluate progress and the effects of our projects and adopt measures to address issues and problems.

**Good Communicators.** We must have not only good speakers but also active listeners. This means that we can express our thoughts clearly and have the ability to persuade our elected officials. We must listen to the views of others and respond to their concern. We must be open to new ideas and even contrary opinions.

As communicators, we must use the right channel or medium for a particular audience at a given time. We must enter into a dialogue with our elected officials---a sharing experience rather than one-way process. We must build a “win-win” rather than a “win-lose” environment.

## Planning Your State HealthIT Day

HIMSS State HealthIT Days are one of the most important events of the year. However, to be effective, HealthIT Day must be timed so that we can have the maximum possible impact upon our legislators. Therefore, your state legislature must be in session. Check your state legislature's web site for this information.

Moreover, it is vitally important that we have excellent turnout at this event. This manual was created in order to help you prepare.

Encourage your chapter to think about HealthIT Day now to maximize your ability to get the planning off to a good start. See the Planning Timeline in the Appendix to keep your process on track.

Your plan of action and milestones are essential to making your State HealthIT Day a success. Use this manual as needed and please don't hesitate to contact Tom Keefe, Senior Director of State Government Affairs, [tkeefe@himss.org](mailto:tkeefe@himss.org) if you have any questions about this manual.

As you start the process to plan a state advocacy day, there are two steps that must be taken before any others:

- The HIMSS Chapter Executive Board must agree to support a State HealthIT Day
- Someone on the planning committee has to take the responsibility to research the state advocacy and ethics laws to make sure any activities for a State HealthIT Day are not in conflict with state laws.

**The Selection Process.** A diverse committee is ideal. Include some people who have attended HIMSS HealthIT Day in Washington, DC. To get things done add new members who can provide fresh perspectives. People from a range of fields will come up with creative ideas, have more contacts, and increase the number of people reached by your HealthIT Day programs. Invite a local reporter to join the group and maximize your chances for media exposure and coverage.

**Make Sure You Have Good Leadership.** Discuss realistic time commitments and responsibilities with your committee members and identify individuals best equipped to lead the planning process. Elect a chair to lead the HealthIT Day committee and, perhaps, a vice-chair to take over next year.

**Set Goals.** Encourage your committee to come up with at least three goals for HealthIT Day. Do you want to support certain legislation, increase awareness of your HIMSS Chapter, or support funding of state HIT? Do you want to make your program more interactive, educational, or fun?

**Match Your Programs to Your Goals.** With goals in place, focus on programs that will help you reach them, keeping your target audiences in mind. Use the expertise of your committee members, and brainstorm options. There are various types of programs and agendas. For example, HIMSS Virginia and National Capital Area Chapters chose a one-day event that began at 8:00 a.m. and ended in the afternoon with a closing speaker. However, Oregon included their HealthIT Day with a previously planned conference. Several members of the chapter took time during the conference to go to the state Capitol and meet with state legislators regarding their legislative agenda. The New York Chapter sponsored a day long HIT Day that included several co-sponsors, a briefing book, advocacy training and targeted meetings with legislators. (For more information, see the Appendix, Sample Agendas)

There are numerous options. Once you determine your goals, objectives and budget, explore all of your options and don't be afraid to be creative. You can sponsor a HealthIT Day annually so look for ways to build on the event year after year.

**Message Development.** Clearly defining an overarching message for the day and specific request of individual legislators is critical to success of an Advocacy Day. Your program should have both a large, thematic message and a definite "ask" that is connected to your thematic message. Your thematic message should set a broad context and be media and general public friendly. Your "ask" should be a direct and informed request to legislators and their staff about the action required. Be sure to keep it simple.

**Training.** Avoid sending members to meet with legislators without training based on your message. Members need to know the "ask," understand the theme, and appreciate the legislative and political climate/situation. Further, members should be able to articulate a clear and compelling argument, ideally supported by research, on behalf of the requested legislative action. It is also useful to provide members with some background on legislative process and effective means of working with legislators and staff. Training can take a variety of forms.

Some Chapters may choose to provide members with written and online material in advance of the lobbying day. Others offer a training meeting before sending members to meet with legislators. Organizations opting to conduct training on the day of the lobbying activity can also combine this with motivational activities (see below). A tip sheet or talking points is a must.

**Member Motivation.** One effective technique for HealthIT Day programs is to provide a prominent speaker to both inform and motivate members for action. Usually, this comes in the form of a keynote speaker or a press conference. The

speaker should be someone both recognizable and knowledgeable. It is especially useful if the motivator has, or had, a prominent role in government (at the local, state, or federal level).

Please note that a motivational presentation can also be provided by a respected leader within your organization. But it helps to have a rallying moment to "fire up the troops" and reinforce your message. A related issue to be considered is whether to make the motivation presentation public or private. A public presentation can involve a press conference or public rally. In contrast, a private presentation would be solely for your members and would dovetail with your training program.

**Event Connection.** Many lobbying day efforts also include one or more events in addition to the meetings with legislators. Many organizations begin with a breakfast meeting that provides training and/or motivation for the activities ahead. If you have a prominent speaker or a newsworthy release (for example, a legislative proposal roll-out, research report, significant new support for your cause from a key political figure or group), you might consider conducting a press conference. Other options for events include, evening receptions to honor key legislators, lunch keynote addressed to the members, or a joint rally with allied organizations.

**Coordination.** Effective HealthIT Days require coordination and logistical support. This need for coordination exists on two levels. You must identify which legislators are most important to achieve your objective. This might be members of the committee with jurisdiction over a bill or party leaders in the House or Senate. Once you have identified targeted legislators, match them with specific constituent members and provide staff or Board support for those meetings. It is vital that constituents lead the meeting since they are the most persuasive voice you have.

However, do not leave these key meetings to chance. Make sure the constituent member is well-versed in the issue and the "ask," and support the constituent by sending other members to the meeting as well.

**Resources and Research.** If possible, provide members with something to leave with legislators and/or staff. Recent reports on the subject, supportive research or even a fact sheet are useful tools. If legislators and staff come to see your organization as a credible and reliable source of information, you will be far more likely to gain access and support. However, it is NOT sufficient to provide information without a specific request. Legislative staffers are driven by specific actions and required follow up. Simply leaving information, however well-prepared, will not serve your purpose. Tie your information packet to a request. As noted above, it is useful to provide members with resources to

prepare for their meeting, such as sample scripts, talking points and fact sheets.

**Partnership.** HealthIT Days may be conducted by a single organization or a broad coalition. There are specific pros and cons to each approach. Single organization lobby days allow you complete message control and the opportunity to monopolize the public and political recognition (and credibility) such an event provides. However, single organization lobby days mean that you assume all the costs and development burdens of the event. And, obviously, you will mobilize fewer individuals.

Coalition efforts have the primary benefit of volume -- simply put, more people. Coalition efforts also allow you to "piggyback" on the credibility and access of other organizations. However, coalitions by their nature mean a certain loss of control. Be sure to secure a clear agreement regarding the day's message. Also, have clear discussions regarding logistical, staff, content, and financial support. In making the decision take into account your immediate legislative objective and whether or not it is best served individually or collectively. Ultimately, these decisions require a close evaluation of the specific local context.

**Follow-up.** This area is often overlooked but is of great importance. Provide a means for your members to report back the outcome of their meeting (See the Appendix - Meeting Report Form). Did the legislator make a commitment? Did the legislator indicate a preference or leaning? Did the legislator request more information? The status and outcome of each meeting should be documented for later lobbying use.

Also, make sure that members follow up after the meeting with a thank you. Some organizations even provide stationary and/or boilerplate text for this purpose. Finally, follow up with your own members after the legislative session or key vote to make sure that they are aware of how their representative ultimately voted on the issue.

**Access HIMSS Staff Resources and Expertise.** HIMSS provides assistance and resources with chapter lobbying activities. Contact State Government Affairs for consultation and help with building your network!

## Publicity and Promotion

**Chapter Web Site.** HIMSS has found the Internet to be particularly effective in communicating issues, educating members, organizing activists and inspiring people to act. Therefore, we encourage HIMSS Chapters to use their web sites to provide information and online registration.

HIMSS State Government Affairs can also assist you in providing new and relatively inexpensive opportunities for advocating a cause to a broader audience. The reach of the Internet and the viral nature of email have spurred an increase in advocacy organizations turning to technology. Online advocacy can be extremely powerful when combined with offline efforts. Please see the Appendix for Sample Web Site Copy

**Chapter Publicity.** HIMSS national office offers several [publications](#) that list state activities. They are HIMSS Pulse on Public Policy, Chapter Leader E-News, and the Weekly Insider. These publications will also run an article (often with photographs) about your Advocacy Day. Please email your media advisories and press releases to [Elinore Boeke](#), HIMSS Sr. Manager Public Policy Communications.

## Working with the Media

**Define Your Message First.** In today's world there is an abundance of information coming at us everyday. Given a chance to have the media run just one sentence from you – what would it be? Spend some time developing your main point, as this will be the most important part of your communications strategy and the foundation for everything else you convey. Choose a goal, and craft your message so that it supports that goal. Your message should be focused, timely, and relevant and you must stick to it. If you stay on message, you're winning half the battle.

**Stay Informed.** If you want to reach people through the media, you need to stay on top of what people are already talking about, which is often shaped by what's in the media (in a curious cycle). You also need to familiarize yourself with local controversies, keep tabs on which journalists are the ones writing about your issues, and follow closely the nature of the coverage your issues are receiving.

**Gather Data.** It's not enough to read newspapers and watch television; you should take an active role in shaping the news. Subscribe to all of your local papers and begin clipping stories that pertain to healthcare IT issues. Start a database that contains the names and contact information of the journalists

covering your issues. Track the frequency with which these journalists write about your issues. When the time comes to make that pitch call to a journalist, you'll be able avoid pitching something they've already covered. Instead, you can woo them with your familiarity of their material.

**Think Locally, Pitch Wisely.** Journalists have very little spare time and are bombarded with pitches on a constant basis. It is more important that the information you send to them is timely and relevant and retains a human element that their readers will find interesting, than it is to send them lots and lots of stuff with your name on it. Remember, reporters are always looking for the local angle. So, package your message or information in the context of a local story.

**Try Different Tactics.** Press releases are only one of many useful ways to pitch journalists. Be creative in your attempts to reach the public. Your message may be framed just as well within an op-ed article. If you have large budget, perhaps you'd like to hold a press briefing in a unique setting. On a smaller budget, be selective about the publications you think your target audience reads regularly and devote more time to pitching those outlets.

**Choose the Right Tool.** Each tool has its own benefits and drawbacks. Part of making the successful pitch is choosing the right tool. You may be familiar with some of these tools: press releases, media advisories, op-eds, letters to the editor, video news releases, public service announcements, print advertisements, flyer campaigns, press conferences, and staged events. You should consider the nature of your message, the level of urgency expressed, the "news" value, your budgetary constraints (if any), and your target audience when selecting your communications tool to ensure a good fit.

**Provide Extras.** Journalists love it when you make it easy for them to enhance a story. The less research that they have to complete on their own time, the more likely it is that they will use your material as the basis for their piece. You can assist print journalists by providing accompaniments such as photos, anecdotes, fact sheets, handy lists or rankings of relevance, contact and biographical information for topical "experts," and useful website addresses. Try to make all of your information available online, and include collateral research information.

**Locating the Media.** Want to write a letter to the editor? Getting started means figuring out where to write. Information on where to send op-eds or letters to the editor can usually be found on the editorial page of your local paper. If you are tracking journalists who cover your area of interest, be sure to pay attention to newspaper bylines. The Internet has become a tremendous resource for dealing with the media. Most newspapers and television stations maintain websites. Many newspapers even allow you to submit letters and op-

eds online. Websites will usually give you the information you need when determining where to send a press release.

**Play by the Rules.** There are some standards that are part of the media relations game, and you'll tip your hand by ignoring them. Be sure to indicate whether the information contained in the release is free for use "immediately" or if it is "embargoed," for a later date and time. If you include a quote, obtain permission from your source before releasing. Media advisories should include only the most basic details (who, what, where, when, why and how).

**Keep letters to the editor short and sweet. Return media calls promptly.** Don't promise an exclusive to anyone unless you intend to give one. Never attack a journalist – if you need to disagree, do it firmly and with professional conviction, but avoid rudeness under any circumstance. **Tell the truth;** if you are unable to do so for any reason, then say nothing.

**Talk F-A-S-T.** Remember these tips for crafting an effective and compelling message for the media:

**F is for framing.** The frame is the big-picture rationale for why people should listen. A good frame drives home the overall importance and value of your message.

**A is for analogies.** Analogies do two things: allow the listener / reader to explore an idea with more familiar concepts; force the listener / reader to actively engage your idea.

**S is for sound bite.** Incorporate a few short, pithy, memorable phrases. These prompt recall of your message and make good copy for a journalist looking to capture a complex message in a compact, engaging manner.

**T is for tale.** It all comes back to simple storytelling. Stories make a lasting impression and humanize your message. Stories are also useful ways to relate a complex idea to the local context.

## Utilizing Social Media

There has been a shift in the way people communicate online. In the past, people used to use the Internet to draw down information. Today, people are using the Internet to interact and converse with one another. This can be a very valuable tool to help spread the awareness of your event quickly. Social media takes the power behind mailing lists/newsletters and consolidates it into an instant and accessible news form.

Take advantage of Facebook, LinkedIn and Twitter accounts to:

- Increase participation among Chapter members
- Expand your reach to other health IT colleagues
- Spread your message

Reach out to HIMSS National Office to publicize your State HIT Day through HIMSS social media outlets. Contact [Elinore Boeke](#), HIMSS Sr. Manager Public Policy Communications.

## The Day of the Event

After the months and weeks of careful planning, your event is ready. Here are some considerations to make when setting up for the festivities.

**Set-Up.** Make sure the hotel/venue has a registration table outside the room. If media have confirmed they will attend, have a special press table at the event with press releases, supporting documentation and other information. It can also be a place for reporters to conduct interviews and learn about schedules and logistics.

Your podium should be equipped with a microphone and a "multi box" that allow radio and TV stations to plug into the sound system. Request a multi box only if broadcast reporters have confirmed they will attend. Most hotels charge for use of a multi box.

**Signage.** Your event should be clearly marked with identification and directional signs. Signage should be placed on the podium, outside the room and in the lobby area of the hotel/venue. You will also need signs and information on tables directing participants to a designated location prior to departing for their meetings with legislators.

## Media Coverage

### Media coverage on HealthIT Day

- Call assignment editors at local publications the morning of your event to see if your programs are on their assignment lists.
- Have someone on hand who can take quality photographs or a professional videotape of the event.
- Have a volunteer in place to receive reporters at your State HealthIT Day to provide information and assistance.
- Introduce your spokesperson(s) to reporters for interviews.

### Media coverage after Advocacy Day

- Create a post-event news release and send it to reporters with photos for follow-up stories. Include what transpired, who attended, and how many people were reached. For TV, mention the availability of videotape if you have one.
- Collect clippings from publications to inform your constituencies about your State HealthIT Day success.
- Send a thank-you letter to any journalists who contributed to your planning or participated in a program or event.
- To help you plan for next year, keep a file including what worked and what didn't, your media contacts, and suggestions for the future.

## Appendix

Sample Planning Timeline  
Tips for Successful Advocacy Meetings  
Sample Scheduling Letter (Meeting Request)  
Scheduling a Visit with Your Elected Official  
Sample Letter - Keynote Speaker  
Sample Letter - Requesting Proclamation  
Sample Marketing Email  
Sample Marketing Email (Last Chance to Pre-Register)  
Web site Copy  
Sample Press Release  
Sample Agenda  
Sample Virtual March Letter  
Sample Virtual March Letter/HIMSS Legislative Action Center  
Legislative Meeting Report Form  
Post-Meeting Checklist

## SAMPLE PLANNING TIMELINE

**Objective:** The objective of HIMSS State HealthIT Day 2007 is to increase awareness of the benefits of health information technology among state legislators who have an interest in improving the quality and affordability of healthcare. A secondary objective is to introduce prominent members of the \_\_\_\_\_ healthcare community to state legislators and establish the HIMSS \_\_\_\_\_ Chapter as a valuable resource in the development of state healthcare policy.

**HIMSS Team:**

**Date:**

### SAMPLE TIMELINE:

WHAT	WHO	WHEN
Sponsor Initial Organizing Meeting (Organize committee, check State Legislature's calendar, identify possible date, etc.)		
Review HealthIT Day plans with the Board		
Schedule weekly conference call with HIMSS Chapter HealthIT Day Committee/Team (at least 5 months prior to event)		
Hire or appoint an event coordinator		
Reach out to a local college or university and see if they have a student who can assist the HIMSS Chapter prepare for HealthIT day		
Design the overall event plan and budget <u>Include:</u> Venue & food service Labor Publishing costs Special equipment Decorations Acknowledgments/Speaker gifts		
Select HealthIT Day venue		
Register your event with HIMSS Regional Affairs by emailing Tom Keefe, Sr. Director of State Government Affairs at <a href="mailto:tkeefe@himss.org">tkeefe@himss.org</a>		
Identify key legislators. <b>State Senate:</b> <b>House of Representatives:</b>		
Send an "Upcoming Healthcare IT events" e-mail to HIMSS Chapter general mailing list.		

Conduct conference call with Tom Keefe, Senior Director, State Government Affairs, HIMSS and HIMSS-OR chapter representatives.		
Draft <i>key messages</i> and talking points for legislator meetings.		
Solicit the participation of co-sponsors.		
Contact schedulers for Governor and state legislators		
Develop HealthIT Day agenda/program		
Invite speaker(s)		
Solicit HIMSS chapter members for participation in legislator visits.		
Schedule 30 minute meetings with legislators		
Draft <i>HIMSS-Chapter Backgrounder</i> with HIT issue brief		
<b><u>Web Site</u></b> Write copy for web page (See Appendix - Web Site Copy) Post Registration Form Post HealthIT Day Agenda/Program		
<b><u>Media Relations</u></b> Develop media list Write Media Advisory Contact the media (invite them to the event and arrange interviews with speakers and Chapter leader(s)) Write press release		
Appoint or hire a photographer		
Solicit and schedule volunteers		
Email marketing pushes to Chapter Members (monthly then weekly four weeks out)		
Draft HIMSS Chapter HealthIT Day Agenda/Program		
Draft & distribute combined <i>HIMSS Chapter Backgrounder</i> issue brief & talking points.		
Develop list of legislator meetings.		
Obtain legislator bios for HIMSS Chapter presenters.		
Develop HIMSS Chapter presenter bios for legislators.		

Assemble HealthIT Day packets for legislators and HIMSS Chapter presenters.		
<u>Week of HealthIT Day event</u> Confirm logistics with hotel/venue selected Confirm volunteers (tell them where to be and when) Confirm speaker arrival time and greeter Print registration list Provide maps of the facilities for appointments and receptions.		
Conduct post HealthIT Day review.		
Publish closing report.		

## Tips for Successful Advocacy Meetings

Meeting in person with elected officials and/or legislative staff is the most effective means of political advocacy. Here are some important "do's" and "don'ts" to ensure that your lobbying meeting is successful and effective.

### **DO**

**Make an appointment in advance.** Time is always at a premium in legislative offices. Contact the legislator's scheduler in advance to arrange a meeting. It is best to make your meeting request in writing and follow up with a phone call. Be clear about who will be attending the meeting and the specific reason for the meeting. Legislative schedules are unpredictable so don't be put off if your meeting is rescheduled or if you have to meet with staff in lieu of the elected official.

**Your homework.** Prepare carefully and thoroughly for your meeting. Take the time to "know" your legislator by reviewing past votes or statements on the issue, his/her party's position, and committee assignments. Develop an agenda that all your participants clearly understand. Know your talking points in advance and be prepared to make your case. Research the opposition's arguments against your position and, if possible, acknowledge and rebut those arguments in your presentation.

**Stay "on message."** Effective legislative meetings should be narrow in scope. Stick to two or three major positions, state only a few key points in support of your position and make a definite request for action. Many meetings are ineffective because a participant brings up other issues or strays from the key arguments supporting your position. Have a message and stick to it.

**Go local.** Your effectiveness is based on geography. Legislators want to hear your thoughts and opinions because you are a constituent. One of your most useful strategies is to relate the issue and your position to your community. Legislators have many other avenues to get national or state analysis. Local statistics and stories are important and you can be the only source for such rich information. Don't be afraid to humanize the issue by relating it to your local experience.

**Make a clear, actionable request.** Many people are afraid that it's impolite to make a direct request. But, don't forget that the purpose of your meeting is to secure support for your issue. It is appropriate and expected that you will make a request at your meeting. The key is to make sure that your request is clearly articulated and actionable by the legislator. Keep in mind that your request should be timely and consistent with the legislative process. It is usually not enough to ask for generic support for an issue or cause, rather make a direct and specific request that is tied to pending legislative activity (if possible). For example, ask that a legislator co-sponsor a bill. You should make reference to bill numbers and be knowledgeable about the status of the bill. Making a specific request gives you the opportunity to evaluate the legislator's response.

**Cultivate a relationship with staff.** Many grassroots advocates underestimate the important role of legislative staff. A supportive staff person can often make the difference between success and failure. Staff plays an invaluable role in shaping a legislator's agenda and position on issues. It is important that you make every effort to cultivate a positive working relationship with staff. Over time, staff may even come to regard you as a helpful resource for information on your issue.

**Follow-up.** What happens after a meeting is almost as important as the meeting itself. Send a thank you letter after the meeting that not only expresses appreciation but reinforces your message and any verbal commitment of support made by the legislator or staff. If you promise during the meeting to get back in touch with additional information, be sure that you do so. Failure to follow up on your promise will call your credibility into question. Also, don't forget to report the results of your meeting back to ASLA or APA staff. This information is vital to coordinating overall legislative strategy and evaluating the impact of advocacy efforts. Stay informed on your issue and track how your legislator responds. Did the legislator follow through on his/her promise? If not, request an explanation. If so, express your appreciation.

### **DON'T**

**Go "off-message" or discuss unrelated issues.** You must deliver a unified message during your meeting. Sending different messages or discussing unrelated subjects will only undermine your ability to secure support. Limit your advocacy to HIT issues only. Legislators meet with many groups and constituents so it is important that your message and request be clear and uniform.

**Engage in partisan critiques.** It is best to keep the discussion based on the merits of the policy or issue. Avoid characterizing your position in strictly partisan terms. Worse, do not make snide or disparaging partisan comments. You are working on behalf of an issue, not a party. So, you want legislators of both parties to support your position. Be careful not to alienate legislators or staff based on partisanship.

**Use threats.** While it may be tempting to tell a legislator who has rebuffed your request that "you'll never vote for him/her again" or that "you pay his/her salary," such discourtesy only ensures that your arguments will be discounted – now and in the future.

**Be late.** Time is a valuable and scarce commodity for legislators. Punctuality conveys professionalism and demonstrates your commitment to your issue, which is after all the reason for the meeting. Arrive early and if you are meeting as a group allow time to calm nerves and make a final review of the talking points and message.

**Get too comfortable.** Advocates are sometimes surprised by the courteous reception they receive, even from lawmakers who disagree with their position. As a constituent you will be accorded respect by the legislator and staff. Don't mistake this respect for agreement. Don't let the comfortable nature of the exchange deter you from making your request. And, don't mistake "concern" for your issue with support.

## Sample Scheduling Letter

If you haven't already scheduled your meeting, use this template to draft a meeting request. Please see the guide to "Scheduling a Meeting with Your Elected Official" in this Appendix, and contact HIMSS State Government Affairs staff with any questions or problems.

The Honorable [Insert Name]  
123 Green Street  
City, State 33333  
*Via fax:* (333) 333-3333  
Attn: Scheduler's Name  
[Insert Date], 2008

Dear Representative or Senator [Insert Name],

HIMSS \_\_\_\_\_ Chapter is sponsoring Health IT Day on \_\_\_\_\_. Health IT Day will bring more than \_\_\_ senior and executive-level healthcare information technology (HIT) stakeholders to \_\_\_\_\_ to educate members of the General Assembly on HIT and the best use of management systems to transform healthcare. The attendees will include clinicians, IT executives, directors and managers who work in the state's healthcare provider institutions, payer organizations, the military and other branches of government, academic centers, and supplier and consulting companies.

As your constituents, we would appreciate an opportunity to meet with you to discuss the current state of HIT in \_\_\_\_\_ and how HIT is being used in states across the country to decrease healthcare costs and save lives. We have reserved \_\_\_\_\_ to \_\_\_\_\_ for meetings. We hope your schedule will permit a 15-20 minute meeting on \_\_\_\_\_.

Should you have questions or need additional information, I can be reached on \_\_\_\_\_. I thank you in advance for your time and attention.

Sincerely,

Your Name

## Scheduling a Visit with Your Elected Official

1. **Know the name of the office scheduler.** This is the only person in the office who will be able to take your request for a meeting and this is whom you ask for by name when you call. When you send your letter of request, you should put it to the attention of this person to ensure that it gets to the appropriate desk for review.
2. Be prepared to **fax information to the scheduler** for review. This correspondence should provide a brief background of why you want to meet with the official and when. It is important to **mention that you are a constituent**, and while it is okay and usually helpful to state the issue you'd like to discuss, you should not be too opinionated on that issue in your letter. **See sample letter as an example.**
3. Keep in mind that officials have very busy schedules, so it is recommended that you ask to meet with them for only a 15-30 minute time slot.
4. It is recommended that before calling the scheduler you first **fax your request** for a meeting so they have time to look at the official's schedule and availability.
5. Next, **call the scheduler**, introduce yourself, mention that you are a constituent of Representative X, and let him/her know that you are following up on a request to meet with X in the district office. Let the scheduler know precisely when you faxed your request so he/she is more easily able to locate it.
6. Sometimes requests are lost in the chaos that typifies elected officials' scheduling offices. If the scheduler says that he/she did not receive your fax or cannot find it, don't panic. Calmly suggest that you can re-fax the same document or can send it via e-mail if that is most convenient.
7. If the scheduler tells you that the office needs more time to assess your representative's availability on that day, let him/her know that you will follow up by calling back in another few days. Please follow-up! Schedulers have many, many requests coming through the office, so in order to ensure that you are not forgotten or your request hidden under a stack of other papers, do **follow up and call again.**
8. Finally, **thank the scheduler** for their time and effort, and say you appreciate this opportunity to meet with your official.

## Sample Letter to the Keynote Speaker

The Honorable \_\_\_\_\_  
(Title)  
123 Street  
City, State

Dear (\_\_\_\_\_):

On behalf of the officers and members of the HIMSS \_\_\_\_\_ Chapter, I am honored to invite you to speak at our inaugural HIMSS State Health IT Day at the General Assembly on (date) at the (location) in (city, state). HIMSS is the healthcare industry's membership organization exclusively focused on providing global leadership for the optimal use of healthcare information technology (HIT) and management systems for the betterment of human health. Founded in 1961 with offices in Chicago, Washington D.C., Brussels, and other locations across the United States and Europe, HIMSS represents more than 30,000 individual members, over 470 corporate members and more than 85 not-for-profit organizations that share our mission of transforming healthcare through the effective use of information technology and management systems

This key public policy event will attract senior level healthcare stakeholders across (state) including clinicians, IT executives, directors and managers who work in our healthcare provider institutions, payer organizations, the military and other branches of government, academic centers, and supplier and consulting companies.

You are invited to address the audience in the opening keynote session scheduled from (time). We can possibly adjust this time to fit your schedule. Our attendees would like to hear you discuss legislative initiatives that are underway that will influence the growth, development and adoption of information technology in healthcare. This session is meant to give the audience an 'insider's' view on the why and what of legislative trends, and to inspire their interest and participation in the public policy process regarding these initiatives.

With your acceptance of this invitation, we look forward to working with you and your staff on logistics and other details. We thank you in advance for your time and attention.

Sincerely,

(Name)  
President  
HIMSS \_\_\_\_\_ Chapter

## Sample Letter Requesting Proclamation

The Honorable \_\_\_\_\_  
Governor  
State of \_\_\_\_\_  
123 Street  
City, State

Dear Governor:

HIMSS \_\_\_\_\_ Chapter represents more than (number of members) (Georgians, Californians, etc.) who are dedicated to improving healthcare for all. We are sponsoring HIMSS Day at the General Assembly on (date). HIMSS Day will bring more than \_\_\_ senior-level healthcare information technology (HIT) stakeholders from across the state to share our professional experiences with members of the General Assembly on how information technology and management systems can be used to transform healthcare for all Virginians and improve patient safety. Our registered attendees include clinicians, information technology executives, directors and managers who work in the state's healthcare provider institutions, payer organizations, the military and other branches of government, academic centers, and supplier and consulting companies.

HIMSS Day at the General Assembly will be held at the \_\_\_\_\_. Attendees will also meet with members of the General Assembly in the afternoon. We are pleased that \_\_\_\_\_, (title), will provide a keynote address to our attendees.

We appreciate your leadership in healthcare, specifically, with the (if possible, list an initiative/legislation the Governor has introduced or signed pertaining to healthcare). We regret that your schedule does not permit you to attend our first statewide HIMSS Day. However, we are writing to request a letter of welcome and proclamation declaring \_\_\_\_\_, as HIMSS HealthIT Day at the General Assembly. I have attached background information on HIMSS for your information.

Should you need additional information, please don't hesitate to contact (name, telephone, and email address). We thank you in advance for your time, attention, and leadership.

Sincerely,

(Name)  
President  
HIMSS \_\_\_\_\_ Chapter

## Sample Marketing Email

**Subject:** Register Today for the Inaugural Virginia HIMSS HealthIT Day- January 18, 2007

20 Virginia HIMSS  
Day at the General  
Assembly

Thursday, January 18  
Commonwealth Park Suites  
Richmond, Virginia

The 2007 Virginia HIMSS  
Day at the General  
Assembly is a  
complimentary event for  
all HIMSS members.

The Inaugural Virginia HIMSS  
Advocacy Day is jointly co-  
sponsored by National Capital Area  
and Virginia HIMSS Chapters.

### Inaugural Virginia HIMSS Day at the General Assembly

**MAKE IT HAPPEN!**

Thursday, January 18, 2007

Commonwealth Park Suites

Richmond, Virginia

---

HIMSS Members are invited to the **Inaugural Virginia HIMSS Day at the General Assembly**. This event will be held at the Commonwealth Park Suites on Thursday, January 18, 2007.

On July 20, 2006, Governor Tim Kaine issued Executive Order 29 creating the Governor's Health Information Technology Council. We need to keep this momentum going in the legislative branch. "Make IT Happen" is both the theme and purpose of the event. Helping the General Assembly understand the importance of healthcare IT **is what HIMSS is all about**.

The 2007 Virginia HIMSS Day at the General Assembly is a complimentary event for all HIMSS members. Take advantage of this unique opportunity to:

- Receive professional legislative action and spokesperson training,
- Meet with your members of the House of Delegates, Senate and other key decision-makers, and
- Hear from top level government officials leading the fight for healthcare IT including Secretary of Technology, Anesh P.Chopra (*invited*), Secretary of Health and Human Services, Marilyn Tavenner (*invited*) and Delegate Dave Poisson..

[Download the Agenda](#)

**[REGISTER ONLINE](#)**

## Sample Marketing Email

### Inaugural Virginia HIMSS Day at the General Assembly

**LAST CHANCE TO PRE-REGISTER!**

**DON'T MISS THIS OPPORTUNITY TO MEET...  
Virginia Secretary of Technology Annes P. Chopra**

Thursday, January 18, 2007

Commonwealth Park Suites

Richmond, Virginia

---

## [REGISTER NOW!](#)

HIMSS Members are invited to the Inaugural Virginia HIMSS Day at the General Assembly at the Commonwealth Park Suites on Thursday, January 18, 2007. It's important that you pre-register for this inaugural event.

On July 20, 2006, Governor Tim Kaine issued Executive Order 29 creating the Governor's Health Information Technology Council. We need to keep this momentum going in the legislative branch. "Make IT Happen" is both the theme and purpose of the event. Helping the General Assembly understand the importance of healthcare IT is what HIMSS is all about.

The **2007 Virginia HIMSS Day at the General Assembly is a complimentary event** for all HIMSS members. Take advantage of this unique opportunity to

- **Hear from top-level government officials** leading the fight for healthcare IT including Virginia Secretary of Technology Annes P. Chopra and Delegate Dave Poisson;
- **Meet with your members of the House of Delegates, Senate** and other key decision-makers; and
- **Receive professional legislative action and spokesperson training.**

**PLEASE NOTE:** Schedule appointments with your state legislators now. Contact information for legislators is online at <http://legis.state.va.us> (click on "Senators" or "Delegates").

[Download the Agenda](#)

# Sample Website Copy

## SAVE THE DATE

Virginia HIMSS Day at the General Assembly:

### SAVE THE DATE...VIRGINIA HIMSS DAY at the GENERAL ASSEMBLY

HIMSS Members are invited to the Inaugural Virginia HIMSS Day at the General Assembly. This event will be held at the Commonwealth Park Suites on Thursday, January 18, 2007. We will meet with the General Assembly members to ensure that health IT public policy issues take center stage in Richmond, VA.

On July 20, 2006, Governor Tim Kaine issued Executive Order 29 creating the Governor's Health Information Technology Council. We need to keep this momentum going in the legislative branch. "Make IT Happen" is both the theme and purpose of the event. Helping the General Assembly understand the importance of healthcare IT is what HIMSS is all about.

The 2007 Virginia HIMSS Day at the General Assembly is a complimentary event for all HIMSS members. Take advantage of this unique opportunity to:

- Receive professional legislative action and spokesperson training,
- Meet with your members of the House of Delegates, Senate and other key decision-makers, and
- Hear from top level government officials leading the fight for healthcare IT including Secretary of Technology, Ansh P. Chopra (*invited*), and Secretary of Health and Human Services, Marilyn Tavenner (*invited*) and Delegate Dave Poisson.

Download the Agenda ([LINK TO AGENDA](#))

Online Registration (Coming Soon!)

### For more information contact:

Tom Keefe  
HIMSS Sr. Director of State Government Affairs  
(703) 562-8813  
[Cathryn.Stam@IAMConsulting.net](mailto:Cathryn.Stam@IAMConsulting.net)

Jessica Martin  
HIMSS Coordinator, Regional Affairs  
703-837-9819  
[jmartin@himss.org](mailto:jmartin@himss.org)

## Sample Press Release

**Media Contact:** Elinore Boeke  
Office: 703-562-8817  
Mobile: 703-939-1371  
eboeke@himss.org

**FOR IMMEDIATE RELEASE**

### **HIMSS VIRGINIA AND NATIONAL CAPITAL AREA CHAPTERS SPONSOR INAUGURAL HIMSS DAY AT THE GENERAL ASSEMBLY**

Richmond, VA (January 18, 2007) -The Healthcare Information and Management Systems Society (HIMSS) Virginia and National Capital Area (NCA) Chapters are gathered in Richmond today for their inaugural Virginia HIMSS Day at the General Assembly to advance the best use of healthcare information technology and management systems to transform healthcare.

“Today is a very special day in the history of HIMSS and healthcare IT in the Commonwealth of Virginia,” said Scott Bateman, president of HIMSS Virginia Chapter. “We have the honor of hosting the association’s first state Advocacy Day. This is definitely the perfect time to be in Richmond - we have a Governor who values and understands healthcare IT, we have newly elected state officials who want to learn the benefits our industry brings to healthcare, and we as individuals and as an organization are committed to educate, inform, and forge relationships with our state representatives that will benefit us individually and collectively.”

“We have more than 60 healthcare IT professionals attending our inaugural HIMSS Day at the General Assembly and that in itself justifies our theme, MAKE IT HAPPEN, because we can MAKE IT HAPPEN,” said Dan Blum of the NCA Chapter. “We do it everyday but far too many of our state and local elected officials don’t know or understand our industry. We are here today to make a difference, to bring knowledge and information of the industry to the General Assembly and to show them how healthcare IT saves lives and saves money.”

By leveraging the strength of our chapters, Virginia HIMSS Day at the General Assembly is the type of grassroots mobilization we need to transform healthcare at the state and local level, said HIMSS Executive Vice President Carla Smith. “I commend Virginians for taking the lead and making it happen in Virginia. There is no better group to educate elected officials on healthcare IT than HIMSS members who work in cities, towns and rural areas throughout the state.”

Virginia HIMSS Day at the General Assembly will be held at the Commonwealth Park Suites, Assembly Room, 901 Bank Street. Keynote speakers include: Virginia Secretary of Technology Aneesh Chopra; Delegate John M. O’Bannon, III, MD; and Delegate Riley

E. Ingram. The media is invited to attend the keynote sessions, which are 8:00-9:30 a.m. and 2:00-3:30 p.m.

**HIMSS** is the healthcare industry's membership organization exclusively focused on providing global leadership for the optimal use of healthcare information technology (IT) and management systems for the betterment of healthcare. Founded in 1961 with offices in Chicago, Washington D.C., Brussels, and other locations across the United States and Europe, HIMSS represents more than 20,000 individual members and over 300 corporate members that collectively represent organizations employing millions of people. HIMSS frames and leads healthcare public policy and industry practices through its advocacy, educational and professional development initiatives designed to promote information and management systems' contributions to ensuring quality patient care.

## Sample Agenda



**1<sup>st</sup> Annual Virginia HIMSS Day at the General Assembly**  
**Thursday, January 18, 2007**  
**Commonwealth Parks Suites, Assembly Room**  
**901 Bank Street - Richmond, VA 23219**

### **“Make IT Happen!”**

- |                 |  |
|-----------------|--|
| 8:00-8:15 am    | <b>Networking Continental Breakfast Reception</b>  |
| 8:15-8:30 am    | <b>2007 Virginia HealthIT Day Overview</b> <ul style="list-style-type: none"><li>➤ <i>Scott Bateman, PMP, CPHIMS</i>, Virginia Chapter President</li><li>➤ <i>Dan Blum</i>, National Capitol Area Chapter Representative</li><li>➤ <i>Carla Smith, NCMN, FHIMSS</i>, Executive Vice President, HIMSS</li></ul> |
| 8:30-8:45 am    | <b>2007 General Assembly Legislative Briefing</b> <ul style="list-style-type: none"><li>➤ <i>Tom Leary, FHIMSS, MALA</i>, Director, Federal Affairs, HIMSS</li></ul>   |
| 8:45- 9:30am    | <b>Opening Keynote Address</b> <ul style="list-style-type: none"><li>➤ <i>The Honorable Aneesh P. Chopra</i>, Virginia’s Secretary of Technology</li></ul>   |
| 9:30- 9:50am    | <b>2007 General Assembly Legislative Training Session</b> <ul style="list-style-type: none"><li>➤ <i>Christopher Kush, MPP</i>, President, Soapbox Consulting, LLC</li></ul>   |
| 9:50-10:00 am   | <b>Walk to the General Assembly Building</b><br>(Approximately 2 blocks)   |
| 10:00 - 12:00pm | <b>Meetings with Legislators and Legislative Staff</b>   |
| 12:00-1:45pm    | <b>Networking Lunch and Debrief (Commonwealth Park Suites)</b> <ul style="list-style-type: none"><li>➤ <i>Christopher Kush, MPP</i>, President, Soapbox Consulting, LLC</li></ul>  |
| 1:45-2:00 pm    | <b>Break</b>   |
| 2:00-2:30pm     | <b>Keynote Address</b> <ul style="list-style-type: none"><li>➤ <i>The Honorable Dr. John M. O’Bannon, III</i>, Vice-Chair, Health Subcommittee, Member, 73<sup>rd</sup> District, Virginia House of Delegates</li></ul>  |
| 2:30-3:00pm     | <b>Keynote Address</b> <ul style="list-style-type: none"><li>➤ <i>The Honorable Riley E. Ingram</i>, Member, 62nd District, Virginia House of Delegates</li></ul>  |
| 3:00-3:30pm     | <b>Concluding Comments</b> <ul style="list-style-type: none"><li>➤ <i>Greg Walton, FHIMSS</i>, Senior Vice President, HIMSS</li></ul>  |

## Sample Virtual March Letter

**(PLEASE NOTE:** This letter should be used by HIMSS members and colleagues who cannot attend your state HealthIT Day.)

Dear State Representative/Senator:

I am writing you today as a constituent and as a member of the HIMSS \_\_\_\_ Chapter. HIMSS is the healthcare industry's membership organization exclusively focused on providing global leadership for the optimal use of healthcare information technology (IT) and management systems for the betterment of healthcare. I would like to work with you to help raise the level of state government leadership of healthcare IT.

On (date), we will sponsor HIMSS Day at the General Assembly. Attendees will also meet with members of the General Assembly. Unfortunately, I cannot attend. However, I would like to share our state legislative goals with you.

- 1.
- 2.
- 3.

Finally, I would like to serve as a resource for you on healthcare IT issues. We can work together to lead an initiative or support an existing initiative. The Institute of Medicine estimates that between 44,000 and 98,000 Americans die each year from medical errors. Many more die or have permanent disability because of inappropriate treatments, mistreatments, or missed treatments in ambulatory settings. Studies have found that as much as \$300 billion is spent each year on healthcare that does not improve patient outcomes -- treatment that is unnecessary, inappropriate, inefficient, or ineffective. Healthcare IT is an enabler for clinicians working to improve the safety, quality and cost-effectiveness of health and healthcare.

Please feel free to contact me on (telephone or email address) if I can be of service to you as we advance the best use of information and management systems for the betterment of healthcare.

Sincerely,

Name \_\_\_\_\_  
HIMSS \_\_\_\_ Chapter

## Sample Virtual March Letter

### Using HIMSS Legislative Action Center (LAC)

(PLEASE NOTE: You must work with [HIMSS Office of State Government Affairs](#) to use this format. The letters are generated via the LAC and emailed directly to the legislators.)



Dear Virginia and NCA Chapter Members:

Today is a very special day in the history of HIMSS and healthcare IT in the Commonwealth of Virginia. We have the honor of hosting the association's first state HealthIT Day. Moreover, this is definitely the perfect time to be in Richmond. We have a Governor who values and understands healthcare information technology, we have newly elected state officials who want to learn the benefits our industry brings to healthcare, and we as individuals and as an organization are committed to educate, inform, and forge relationships with our state representatives that will benefit us individually and collectively. In fact, two healthcare IT bills have already been introduced in the House.

More than 60 of your fellow members have come to Richmond to advocate. You can help our efforts by participating in our Virtual Advocacy Day. All you have to do is take a moment to send a letter to your elected officials. By sending a letter to your Delegate and Senator, you are showing them that healthcare information technology is an issue that should be brought to the attention of the General Assembly.

AND, IT'S EASY. All you need is your zip code, and the Legislative Action Center will help you step by step through the rest.

**[GO TO THE VIRGINIA LEGISLATIVE ACTION CENTER NOW.](#)**

Today is just the beginning of our journey to become a household name in the Commonwealth of Virginia. We thank you for being a part of history and ask you to spread the word among your fellow HIMSS members and colleagues.

# Legislative Meeting Report Form

---

**Background**

*form for each visit.*

*Please complete a separate*

Member of Legislature: \_\_\_\_\_ Time of visit: \_\_\_\_\_

Was the Member present?  Yes  No

Did you meet with staff?  Yes  No

If yes, please provide their name(s) and title(s):

\_\_\_\_\_  
\_\_\_\_\_

---

**Requests**

Did you describe the advantages of Electronic Health Records and other health information technology (HIT)?

Yes  No  Maybe

Explain:

Did the Member agree to consider HIMSS as a resource related to HIT initiatives and legislation?

Yes  No  Maybe

Explain:

Did the Member or staff make a specific request?

Yes  No  Maybe

Explain:

How would you rate this meeting overall?

**Excellent**

**Good**

**Fair**

**Poor**

Explain:

---

**About You**

Your Name: \_\_\_\_\_

Your Chapter (if HIMSS Member): \_\_\_\_\_

Other Lobby Day attendees who were present: \_\_\_\_\_

---

---

**THANK YOU FOR YOUR SUPPORT!**

## Post-Meeting Checklist

Follow the steps outlined below when your meeting is complete. This checklist will help ensure that there is successful follow-up from your meeting. If you have any questions or need assistance, contact HIMSS Sr. Director of State Government Affairs Tom Keefe at 703-562-8813 or at [tkeefe@himss.org](mailto:tkeefe@himss.org).

**Complete and return your legislative meeting report form** to the Chair of your HIMSS State HealthIT Day. Send [HIMSS](#) any digital photos from your visit for use on HIMSS website and publications.

**Send thank you notes.**

**Follow-up with any information or other items promised** at the meeting.

**Keep track of the issue and make sure that you monitor your legislator's actions.** If they follow through on a promised action, be sure to thank them. If not, encourage them to do so.

When you get home, **send a note to the district staff.** Tell them about your meeting and offer to be a resource on planning issues in the district. Consider ways to get your information in front of them. For example, you can provide complimentary newsletter subscriptions, special reports, or invitations to chapter events. HIMSS can provide you with district staff names and contact information.

**Continue to build relationships with your state legislative delegation** by inviting them to attend or speak at chapter events, taking them to visit local projects, and keeping them informed about planning activities in the state.

**Work with HIMSS State Government Affairs to monitor state legislative activity and continue to advocate on behalf of our federal legislative agenda.** Stay active in grassroots advocacy activities.