

HIMSSSM

Chapter Advocacy Day Toolkit

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Executive Summary

Hosting an Advocacy Day is one key part of what Chapters do to engage in public policy. The following highlights key points and frequently asked questions:

What is an advocacy day?

An advocacy day is a convening of chapter advocates, partners, and volunteers with the goal of educating policymakers and/or influencing public policy.

Why are these important?

These are important because we have rights as private citizens to use our collective voice to influence policy. HIMSS Chapters present one vehicle to use our voices to influence policy.

Hosting an Advocacy day allows a Chapter to stay abreast of current issues affecting your membership and have a plan in place to educate members of the state legislatures, the Governor's office and other state officials. Each chapter and state is different, however one thing is certain: regardless of the level of available resources, every Chapter should explore the value of hosting an Advocacy Day.

What are a few keytips to keep in mind?

- Start planning early.
- Leverage the expertise of other Chapter Leaders who may be more experienced from your and other Chapters through engaging in the Chapter Advocacy Roundtable (CAR).
- Stay on message.
- Follow-up and maintain relationships with policymakers.

How can I use this toolkit?

This toolkit aims to guide chapters in planning and executive a successful Advocacy Day. These suggestions are based on success factors of previous Advocacy Days. However, you may absolutely try something new and creative. Novice and experienced advocates alike will find this toolkit helpful.

Does HIMSS have a Legislative/Policy Action Center?

Yes! [Click here](#) for the Legislative Action Center. On this site, you can take part in campaigns, track state legislation, identify and contact your government officials, and learn more about HIMSS policy priorities.

Who should I contact for support?

Please contact the HIMSS Government Relations team at policy@himss.org. You may also connect with the CAR Chair or Vice Chairs, [listed here](#).

Advocacy and Grassroots Mobilization

As HIMSS advocates, what qualities are important to be successful?

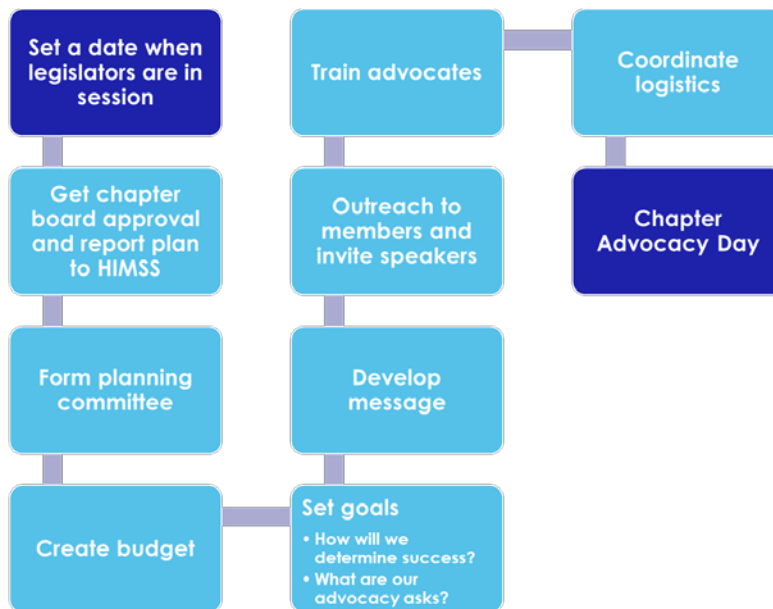
Commitment. We have to be dedicated and committed to the cause—the transformation of health through information and technology. We must be energized by our desire to serve and be challenged by constraints we face.

Dynamic Managers. We must be aware of the situation of health and IT in our area. We must set objectives. We must plan our strategies and activities based on the best use of the resources available. We must organize advocacy events to achieve the shared goal of health transformation. We must monitor and evaluate progress and the effects of our projects and adapt our efforts accordingly.

Effective Communicators. We must be effective communicators and active listeners. We must express our thoughts clearly and have the ability to persuade and work with our government officials. We must also listen to the views of others and respond to their concerns. We must be open to new ideas and even contrary opinions.

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 Advocacy Day



See [Planning Timeline](#) in Appendix and [Event Planning](#) on the CLRA.

Timing. An Advocacy Day must take place during the state legislature’s session to

make it possible to invite legislators to speak and to visit their offices. Some legislatures meet annually while some meet every other year. Encourage your chapter to think about an Advocacy Day early on. See the [Planning Timeline](#) in the Appendix for guidance. Beginning to create your plan of action is essential for success.

Chapter Board approval and State Law Compliance. As you start the planning process, take these initial steps:

1. The HIMSS Chapter Board must agree to support an Advocacy Day; and
2. A Chapter board member must research the state advocacy and ethics laws to make sure any activities are not in conflict with state laws. You may not use paid lobbyists to support your Advocacy Day. Please refer to the National Conference of State Legislature's [chart of lobbying definitions by state](#).

Form a planning committee. A committee that is diverse in advocacy experience level and backgrounds is ideal. This will lead to more creative brainstorming, more contacts, and increase attendance.

Ensure Effective Leadership. Discuss realistic time commitments and responsibilities with your committee members and identify individuals best equipped to lead the planning process. Appoint a Chair to lead the Advocacy Day committee and, perhaps a Vice Chair to take over the following year.

Budget. Estimate your expenses. This may include providing a meal, signage, folders and printing, and travel support for speakers.

Set Goals. Encourage your committee to identify a few actionable, measurable goals for Advocacy Day. Do you want to support certain legislation, increase awareness of your Chapter, or support funding of state health IT? Do you want to make your program more interactive, educational, or fun? How will you know you have reached these goals?

Match Your Program to Your Goals. Focus on program that will help you reach your goals, keeping your target audiences in mind. For more information, see the [Sample Agenda](#) in the Appendix. Once you determine your goals, objectives and budget, explore all of your options and be creative. You may sponsor an Advocacy Day annually so look for ways to build on the event year after year.

Message Development. Clearly define an overarching message for the day and specific "asks" of legislators. Your program should have both a large, thematic message and specific asks which connects to your thematic message. Your "ask" should be a direct and informed request to legislators and their staff about the action required. Be sure to keep it simple and do not make more than **four** asks.

Training. Train the participants in person or virtually before their meetings with

legislators. Members need to know the "ask," understand the theme, and appreciate the legislative and political climate. Further, members should be able to articulate a clear and compelling argument, supported by both relevant data and personal/professional stories. Provide members with background on the legislative process and effective means of working with legislators and staff.

Training can take a variety of forms. Some Chapters provide members with a training guide by email a few days ahead of the event while others offer a virtual webinar training. In addition, chapters may offer an in-person training or refresher the morning before the meetings. Chapters opting to conduct training on the day of can also combine this with motivational activities (see below in Member Motivation). Providing written talking points is essential.

Event Connection. Many Advocacy Day efforts also include an event in addition to the meetings with legislators. Some begin with a presentations, training and motivation for the legislative meetings ahead. Other options for events include evening receptions to honor key legislators or legislative staff, a lunch with keynote presentation, or a joint rally with allied organizations.

Yet another idea is to conduct meetings in the morning, followed by an event in the Capitol. In this way, members can invite the legislators and their staff to the afternoon event. This is only suggested if training has taken place beforehand. See the [Sample Agenda](#) in the Appendix.

Coordination. Effective Advocacy Days require coordination and logistical support. First, 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 volunteers who are their constituents. It is vital that constituents lead the meeting since they are the most persuasive voice in the room. Each advocacy group should have a mix of newer and experienced advocates and typically include 2-4 advocates.

Some chapters invite a local student to volunteer (or with stipend) to coordinate logistics. This can help facilitate Chapter partnership with the college or university and attract student, faculty, and staff membership!

HIMSS Speakers. If you are interested in requesting a HIMSS staff member to speak at your event, you must submit the [Speaker Request Form](#) to Chapters@himss.org with as much information and details known about the event to ensure accuracy of logistics and planning and to expedite the request. HIMSS requests a 6-8 week lead-time before the event.

Resources and Research. Provide advocates with a leave-behind folder for legislators and staff. If legislators and staff come to see your chapter as a credible and reliable source of information, you will be far more likely to gain access and support. Provide members with resources to prepare for their meeting, such as sample talking points and fact sheets. It is also important to know what the opposing views to understand potential arguments.

Partnership. Advocacy Days may be conducted by a single organization or a broad coalition. Single organization events allow you message control and the opportunity to control the public and political recognition (and credibility) such an event provides. However, single organization events mean that one organization assumes all the costs and development burdens of the event. Plus, you will likely mobilize fewer individuals.

Coalition efforts will attract more attendees and allows 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 plan and messaging. Hold discussions regarding logistics, staff, content, and financial support.

In making the decision to partner, account for 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. If you plan to have a formal partnership in planning your Advocacy Day, please submit a [Collaboration Request Form](#) to HIMSS.

Follow Up. Following up is one of the most important steps, yet it is often over looked. Provide a means for your members to report back the outcome of their meeting (See the [Sample Legislative Meeting Report Form](#) in the Appendix). Did the legislator make a commitment? Did the legislator indicate a preference? Did the legislator request more information? Document the status and outcome of each meeting for future advocacy and relationship building. Make sure that your volunteers follow up after the meeting with a thank you and copy the chapter. In addition, follow up with your volunteers and participants to thank them for their efforts.

Access HIMSS staff resources and expertise. Contact policy@himss.org for a consultation!

Planning a Virtual or Hybrid Advocacy Day

Virtual meetings could include webinars and video conference calls. At the same time, using virtual components as part of the hybrid model for hosting an Advocacy Day can help Chapters save money, travel time, and avoid weather hazards while at the same time extending the meeting's scope by bringing it to virtual audiences. These events allow advocates to create a year-round presence in the state capitals and create pathways to reach members who are less likely to engage. [Click here](#) for the Advocacy Virtual Events Guide under General Resources.

Incorporating social media or posting a blog is a standard practice to interact with state officials and legislators. During the event, organizers must develop a way to engage virtual attendees in the experience and include two-way communication with the remote audience.

Review additional event planning [tips and resources](#) on the Chapter Leader Resource Area (CLRA).

These are four types of Chapter Advocacy Days:

1. **Traditional:** Face-to-face meetings with state legislative offices in the state capital while the legislature is in session. See sample agenda [here](#).
2. **Hybrid:** Featuring both face-to-face elements with legislative offices, including meetings with state legislators and virtual elements (e.g. webinar) that include constituents who cannot make the trip to the Capital.

Example: The three Pennsylvania Chapters coordinated an Advocacy Day, which typically includes in-person legislative meetings, followed by a webinar held in the state Capitol featuring legislators and legislative staff, which maximizes engagement.

3. **District Office Visits:** Members visiting their state legislator district offices. This is especially useful for planning events in states that are not in session every year. For example, the Texas legislature only meets every other year.
4. **Virtual:** HIMSS is able to set up a limited number of virtual chapter campaigns (e.g. write a letter campaign), to be posted on the [Legislative Action Center](#). Inquire at policy@himss.org.

Publicity and Promotion

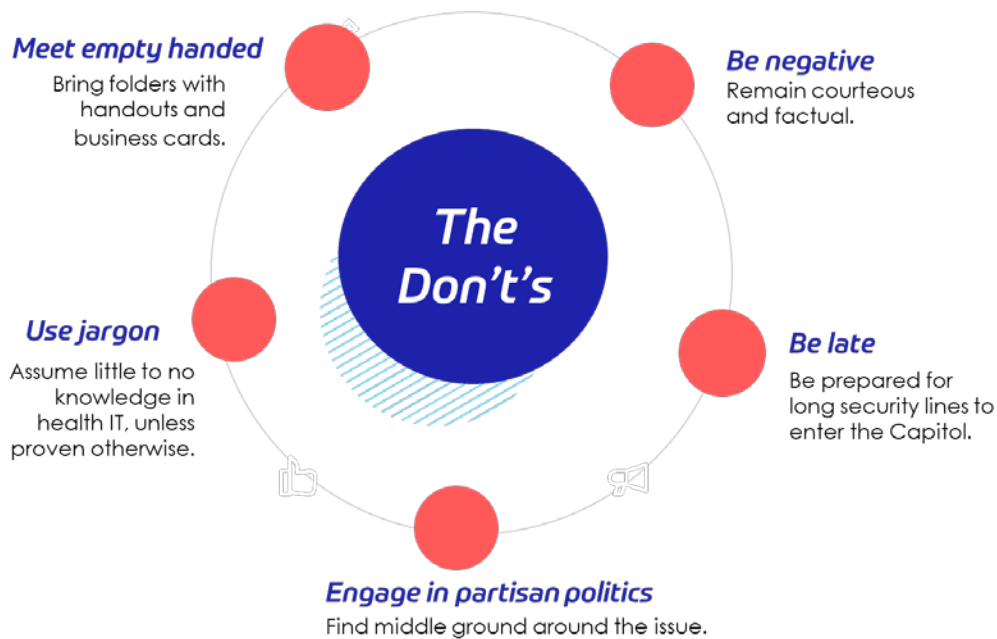


Interested in spotlighting your chapter's initiatives and accomplishments on HIMSS.org? [Learn more and submit your concept](#) for consideration.

Tips for Successful Advocacy Meetings: The Do's and Don'ts



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A Guide for Meeting with your Legislators

1

The Stage

- Set the stage: Who you are and who you represent
- Are you constituents?
- About HIMSS

Quick tip: HIMSS represents a large, diverse membership. This is beneficial to officials since HIMSS has already done the collaborative work and is not who they often see – an organization which represents one group of stakeholders in healthcare. Emphasize this with a description of HIMSS and its diverse membership.

2

The Punch Line

- What are the issues? Why should they care?
- Include Data and stories

Quick tip: Have talking points printed out in case you need to refer to any specifics, such as legislation dates, titles or facts.

3

The Closer

- What are they asking for?
- How can you be a resource for their office?
- Closing: "This is how we can support you..." or "How can we support you?"

Quick tip: Create chapter business cards with your contact information. Provide your volunteer advocates the same business card to distribute to offices.

Appendix: Sample Planning Tools and Templates

[Planning Timeline](#)

[Legislative Meeting Scheduling Letter](#)

[Speaker Invitation](#)

[Letter to Request Proclamation Declaring State Health IT Day](#)

[Promotion for Web & Email](#)

[Advocacy Day Agenda](#)

[Legislative Meeting Report Form](#)

Planning Timeline

In addition to this timeline, see our other resources for event planning [here](#).

Pre-Meeting Checklist

- Hold initial organizing meeting (Organize committee, check State Legislature's calendar, identify possible date, etc.)
- Review Advocacy Day plans with the Chapter Board
- Schedule regular meetings with Advocacy Day Committee (at least 5 months prior to event)
- Outreach to a local college or university to request assistance from a student
- Design the overall event plan and budget (Include: Venue & food service; Labor; Publishing costs Special equipment; Decorations; Acknowledgments/Speaker gifts; folders for leave-behind handouts and swag)
- Confirm venue
- Add event to [Events & Initiatives](#) Google Sheet to keep HIMSS and other Chapters aware. ([Instructions here](#))
- Identify key legislators
- Share "Save the Date" with your Chapter members
- Post information and registration link on your Chapter webpage and social media
- Hold call with HIMSS for advice or technical assistance, if necessary
- Draft key messages and talking points for legislative meetings.
- Solicit the participation of [sponsors](#) and partners
- Contact schedulers for Governor and legislators
- Develop agenda
- Invite speakers
- Solicit chapter members for participation
- Schedule 15-30 minute meetings with legislators and/or their staff
- Appoint a photographer
- Solicit and schedule volunteers
- Email marketing to chapter members
- Write and distribute HIMSS Chapter Background, issue brief & talking points.

- Assemble folders/packets for legislators and attendees

Week of Checklist

- Confirm logistics with venue
- Confirm volunteers and share logistical information
- Confirm speaker arrival time and greeter
- Print registration list and other important documents
- Provide maps of the facilities for appointments and receptions.

Set-Up: Make sure the 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. Clearly mark your event with identification and directional signs. Place signage at the podium, outside the room and in the lobby area of the venue. Place signs and information on tables directing participants to a designated location prior to departing for their meetings with legislators.

Post-Meeting Checklist

- Hold a debrief.
- Complete and return your [legislative meeting report form](#) to the Chair of Advocacy Day planning. Send HIMSS staff any 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 bills and issues and 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.
- Send a note to the 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 by inviting legislators and their staff to attend or speak at chapter events and keeping them informed about chapter affairs.

Legislative Meeting Scheduling Letter

Use this template to draft a meeting request. This should provide a brief background of why and when you want to meet with the official. If you are, include that you are a constituent, and while it is okay and usually helpful to state the issue you would like to discuss, you should not be too opinionated on that issue in your letter.

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 an Advocacy Day on (Date) _____. This will bring more than (#) health information technology (HIT) stakeholders to educate members of the General Assembly on the best use of information and technology to transform health. 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 health IT in (state) and how it is being used across the country to decrease healthcare costs and save lives. We have reserved _____ for meetings. We hope your schedule will permit a 15-20 minute meeting on date _____.

Should you have questions or need additional information, please do not hesitate to contact me at _____. I thank you in advance for your time and attention.

Sincerely,

Your name & chapter role

Speaker Invitation

Dear (_____):

On behalf of the officers and members of the HIMSS ____Chapter, I am honored to invite you to speak at our inaugural HIMSS Chapter Advocacy Day at the General Assembly on (date) at the (location) in (city, state). HIMSS is a global, cause-based, not-for-profit organization focused on transforming health through information and technology. I would like to work with you to help raise the level of state government leadership of healthcare IT.

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

Letter to Request Proclamation Declaring State Health IT Day

Note: This can be modified for addressing a mayor to request a city proclamation (Chapter or organization logo)

Full Name

Governor of (state)

(Mailing Address)

Dear Governor (last name):

The Healthcare Information and Management Systems Society (HIMSS) is a global advisor and thought leader supporting the transformation of health through information and technology. I am writing on behalf of "HIMSS _____ Chapter", which represents more than (number of members) (Georgians, Californians, etc.) who are dedicated to transforming health for all.

On date, the HIMSS ___ Chapter will host an Advocacy Day.

We appreciate your leadership in healthcare, specifically, in regards to (if applicable, list an initiative/legislation the Governor has taken part/signed pertaining to health IT). Therefore, we are writing to request a letter proclaiming Advocacy day Date as State Health IT Day.

Please do not hesitate to contact me should you need additional information. We thank you in advance for your attention and leadership.

Sincerely,

Name and chapter role

Promotional Message for Web & Email

Subject: Register Today for the Annual Virginia HIMSS Advocacy Day

HIMSS Virginia Chapter Advocacy Day

DATE

LOCATION

Richmond, Virginia

You are invited to the Virginia HIMSS Day at the General Assembly. This event will be held at _____ on _____.

“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 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 _____.

[View the Agenda](#)

REGISTER ONLINE

HIMSS Member Rate:

HIMSS Non-member rate:

Advocacy Day Agenda

Annual Virginia Advocacy Day at the General Assembly

DATE/LOCATION

"Make IT Happen!"

8:00-8:15 am	Networking Breakfast
8:15-8:30 am	Virginia Health IT Day Overview <ul style="list-style-type: none"><input type="checkbox"/> Virginia Chapter President<input type="checkbox"/> National Capitol Area Chapter Representative<input type="checkbox"/> HIMSS National Representative
8:30-8:45 am	General Assembly Legislative Briefing
8:45- 9:30am	Opening Keynote Address
9:30- 9:50am	General Assembly Legislative Training Session
9:50-10:00 am	Walk to the General Assembly Building, (address) (Approximately 2 blocks)
10:00 – 12:00pm	Meetings with Legislators and Legislative Staff
12:00-1:45pm	Networking Lunch and Debrief
1:45-2:00 pm	Break
2:00-2:30pm	Keynote Address
2:30-3:00pm	Secondary Keynote Address
3:00-3:30pm	Concluding Comments

Legislative Meeting Report Form

Please complete a separate form for each visit.

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):

Responses

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 Advocacy Day attendees who were present: _

THANK YOU FOR YOUR SUPPORT!