HIMSS CHAPTER ADVOCACY VIRTUAL EVENT GUIDE

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Introduction

Purpose
The HIMSS Chapter Advocacy Roundtable Virtual Events Guide provides basic information on employing technology to facilitate information flow between legislators and Chapter members and guests. In addition, this guide provides general logistic and event planning suggestions and support for implementing virtual events.

Utilization of virtual technology can be a great equalizer for small chapters who may lack the number of members to implement a large scale event such as a state Health IT day. Virtual technology can also be a great help to chapters who are a long distance from their legislators or for groups of chapters implementing a large scale event.

Chapter Advocacy Roundtable (CAR) Resources
This section provides information on tools already available through HIMSS that would provide support in any event planning:

Chapter Leader Resource Area (CLRA)
The CAR has access to an internal site hosting advocacy resources, including the documents outlined below and other planning manuals and guides.

Chapter Advocacy Toolkit
The Chapter Advocacy Toolkit provides an introduction to chapter advocacy and the chapter advocacy roundtable (CAR).

Chapter Advocacy Day Toolkit
The Chapter Advocacy Day Toolkit guides advocates on how how to host a Chapter Advocacy Day.

Legislative Action Center (http://cqrcengage.com/himss/home)
The Legislative Action Center enables HIMSS members to research, educate and communicate with U.S. federal and state officials.

Education for Legislators, Chapter Members, Health IT Industry
One of the primary goals of Advocacy events, including virtual events, is to communicate information on emerging Health IT issues such as Health Information Exchanges, Regional Extension Centers, mobile health, privacy/security and telehealth to legislators and HIMSS chapter members and guests.

While selecting content for your virtual events, it is important to understand what is important to your legislators. Every state has a website outlining recent legislation and requested studies. This can be a great guide to identifying what would be important to your legislators. In addition, most legislators are interested in how their

state fares as compared to other states; data comparisons based on emerging topics make a great event topic or leave behind.

Coordination of Advocacy Virtual Events

Utilizing Virtual Events for advocacy efforts will enhance your chapter's programs by enabling more events for your chapter participation. As you are planning your Advocacy events, keep in mind that you can plan events for both when your State legislators are in session and in between sessions. Check your state website for your legislative schedule and your legislator's capitol and home district contact information. Be sure to work with your Chapter's calendar to avoid conflicts with monthly activities and other established events.

Preparation

Preparation is critical, especially for a virtual Health IT Day. Preparing for a virtual event varies only slightly from the ways in which you would prepare for an in-person state Health IT day. Similar tasks include identifying an advocacy committee to lead the planning, generating and collecting informative documents, registering and training volunteers, and scheduling visits, among other tasks.

Define Your Event

Below are descriptions of five different types of state health IT day events.

1. *Traditional Chapter Advocacy Day.* Face to face meetings with state legislators in the state capital while the Legislature is in session as described above.

2. *Hybrid Chapter Advocacy Day.* Featuring both in-person elements with state legislators, which would include some Chapter members meeting with state legislators while they are in the Capital during session, and virtual elements that include constituents who cannot make the trip to the Capital, sending an email message to the legislator. Please refer to Virtual March Letter and HIMSS Legislative Action Center in the Appendix of this document for more information.

3. *District Office Visits.* Coordination of HIMSS members visits to their state legislator district offices on a specific state Health IT day. This is especially useful for planning events in states which are not in session every year.

4. *Regional Chapter Advocacy Day.* Features multiple state chapters participating in a WebEx. Includes hosting a national speaker during the program followed by Chapter-organized on line messaging to send HIT information using the Legislative Action Center to their specific state legislators.

5. *Completely Virtual Chapter Advocacy Day.* Includes one or more chapters within a state or region, preparing through a series of conference calls and e-mail correspondence, mobilizing volunteers to use the Legislative Action Center to initiate contact with State Legislators. That initial contact can lead to in-person meetings – either in the capitol office or at the local district office. These virtual

days can also include speakers and panels participating in a WebEx teleconference or internet conference.

Co-Hosts & Sponsorships

When defining the event – consider the possibility of sponsorships or co-hosting events. When facing steep budget restrictions, you can expand the breadth of your event by finding like-minded associations or bi-partisan groups to participate in the event with you. On previous chapter advocacy days, chapters have partnered with State Hospital Associations, State Medical Associations, the local division of the American Health Information Management Association (AHIMA), and the College of Healthcare Information Management Executives (CHIME). Adding sponsors provides additional resources including funding and volunteers; however, be aware that if you obtain a sponsor you must communicate this to the Chapter Board of Directors for review prior to approval. Many chapters have established a chair that monitors these financial agreements, and preexisting agreements and perceptions derived from potential agreements must be taken into account when acquiring a sponsor.

As you are planning virtual events, look to existing industries such as financial and training/educational for ideas and methods, as these industries have been using virtual communications successfully in the past. In addition, local educational organizations and businesses such as community colleges can provide logistical support to virtual events, especially video conferencing, as they frequently already have this capability.

Define Your Event Goals

Chapters should establish clear and concise goals. This includes targeted messaging and asks. Be sure there is consistency across all your messaging and make sure any messaging and asks are agreed upon by all parties. Also, be sure to check your state's legislative website for current health IT legislation and content when crafting your messaging and asks.

Provide Advocacy Training

The HIMSS Government Relations Team can provide advocacy training for those who are new or needing encouragement to reach out to or meet with legislators. They provide training covering topics from how to structure a legislative meeting to leveraging existing virtual advocacy tools to make outreach effective.

Identify Technology

Successful events include both a robust digital and tactical plan. Identify staff who can work to create websites for virtual events and who can establish and manage virtual documents including social media pages. The following are technologies that you can consider implementing throughout your event. Please be aware of technology limitations with respect to content you are trying to present. Topics with a lot of content, especially graphic content, require hardware and network resources to accommodate them.

Webinars/WebEx

Webinars allow guests across large geographic areas to join together virtually to collaborate, discuss, and learn using an internet connection. They provide a platform where people can share documents, follow along as someone shares their desktop, or learn as someone gives a presentation – all at a low cost.

Video Conferencing/Go To Meeting (www.gotomeeting.com)/Google Plus (http://plus.google.com)

While video conferencing requires more bandwidth, it allows participants to form a more genuine connection with the speaker simply because they can see them. These sites can provide a virtual Health IT day with a more intimate feel for participants.

Twitter

Twitter allows you to instantly connect, through a 140 character message limit, with colleagues, experts, news sources, and others. Using this connection you can network, market, educate, and communicate information including quotes, links, pictures, videos and most importantly – #hashtags. Twitter chats are virtual brief forums to share and discuss pertinent issues. Twitter chats usually last for an hour or two, then are closed, but the information remains for later viewing.

Facebook

Facebook is a social utility that connects people and groups with those who work, study and live around them. Facebook features Groups and Pages which allow companies to enter the discussion and gather followers or "likes" which then allows your posted messages to show up on other members' news feeds. Many messages can be short and include a colorful infographic linked to a page with the full study. This provides a great hook to get a follower reading.

LinkedIn

LinkedIn provides a professional platform for you to build and engage with your professional network and to access knowledge, insights and opportunities. Similar to Facebook, LinkedIn also has pages which allow for the sharing of information and visuals; however, it emphasizes discussions amongst industry experts who are willing to share advice.

Survey Monkey

Create and publish online surveys in minutes, and view results graphically and in real time to generate event metrics. Survey sites allow you to design the questions, collect the responses, and analyze the results all in one user friendly area.

E-Newsletters

Electronic newsletter (e-newsletter) can be distributed via email quarterly or monthly to circulate information in a concise, accessible fashion.

Identify Legislative Constraints

Researching lobbying laws, regulations, and pending legislation is crucial before approaching legislators. States can have restrictive ethics rules and guidelines

preventing unregistered lobbyists from meeting with legislators on specific measures. These rules must be explored and participants must be aware of them before initiating conversations with legislators or staff.

These restrictions can also come into effect when soliciting sponsors. Again, when teaming up with other companies or organizations be sure to reference state lobbying laws or ethics before signing any contracts.

Acquire Awards & Commemorative Messages

One of the goals of HIMSS Chapter members is to make their state officials aware of any Awards that HIMSS members in their state might receive and consider an exceptional accomplishment. There are several ways to communicate this information with their state elected officials. Visibility and audience awareness of HIMSS awards are essential for the continued success of HIMSS Chapters and the projects they support.

Publicity efforts should be tailored to the HIMSS Chapter's specific community. Included below are some important steps to help navigate the varied strategies used for these specific HIMSS Awards and milestones. To ensure these recognitions are acknowledged, there must be public and legislative support. Public awareness and support result from continuous education to state officials about the many ways that health information technology enriches the quality of life in your community.

Therefore it is critical for HIMSS members to educate the public, including elected local officials and state legislators, about how funds are used locally and the resulting impact on community life.

As an example, HIMSS Analytics recognized UC Davis Medical Center in Sacramento, California, with its Stage 7 Award. The award represents attainment of the highest level on the Electronic Medical Record Adoption Model (EMRAM) ^{SM}, which is used to track EMR progress at hospitals and health systems. You can visit these 2 sites to research what hospitals in your state have received a Stage 7 Award: the EMRAM home page (http://www.himssanalytics.org/emram/index.aspx) and the EMRAM data displayed by state (http://www.himssanalytics.org/emram/scoreTrends.aspx).

Working with Governors – A Sample Case

Using California in this following example, there are many ways to acknowledge this accomplishment, starting with the Governor. You could invite the Governor to visit the hospital, by following the easy steps that are found on the State of California website. The Governor can be invited to the event by submitting a formal request in writing including the date, time and location of the event along with information pertaining to the nature of the event and the requested role of the Governor at the event, with at least 30 days advance notice, to the Governor's scheduling office.

Commemorative Messages

Commemorative messages – which are non-legal documents – are for an event or special occasion. When requesting a commemorative message a draft of the requested language (200 words or less) and background information on the organization or individual must be included. Commemorative messages are issued only to current California residents or organizations or to organizations hosting events in California. There are three types of commemorative messages and each has a different submission process.

Proclamations

Official proclamations – which *are* legal documents – declare a day, week or month to recognize a specific person, entity or event, and are issued for holidays or public awareness campaigns initiated by state agencies. If your proclamation request is for an event or day other than a state or national holiday, it must be first evaluated and sponsored by the state agency under which the issue falls. The Governor's Office does not issue official proclamations for individuals or private organizations; those types of requests are fulfilled by commemorative messages.

Letters of Recognition

A letter of recognition is issued for individual achievements by California residents. They are often submitted by the employer of an individual who is retiring after a career in public or military service.

Certificates

Certificates of recognition or certificates of commendation are no longer provided by the Governor's office. Instead, another way to acknowledge an individual or enterprise that has received an Award in your state is to work with a State legislator to get a resolution sponsored or bill passed noting the accomplishment. In 2011 in Iowa, our CAR, Randy Haskins, worked with the office of Representative Linda Upmeyer to get recognition for an Iowa physician's use of electronic health records. Dr. James Holsinger received the 2011 Nicholas E. Davies Ambulatory Award of Excellence for such actions and through Randy's and Representative Upmeyer's actions, he was recognized at the state level.
http://coolice.legis.iowa.gov/Legislation/84thGA/Resolutions/Introduced/HR135.html

Each state has their own process when it comes to recognizing their citizens or specific events. To begin, contact your local state legislator in conjunction with exploring the Legislatures' and Executive's websites.

Execution

Successful virtual event execution relies on thorough planning. Going into the event, the agenda must be confirmed, the host of the event – if you are holding a webinar – be sure to have constant and reliable access to the Internet in addition to adequate hardware and software resources. Be prepared with a backup plan if a public wireless feed goes out. Consider bringing an Ethernet cable or access device to stay connected. If you are hosting a hybrid event and internet access at the capitol is

spotty, have a remote home base location where the webinar host is located having a reliable internet.

When using public wireless networks be aware of other potential issues involving bandwidth, security, and privacy. Nobody wants to be in the middle of their webinar and exceed the bandwidth of the internet source. Be sure to have staff available to troubleshoot both on site and for virtual participants.

Advertising Your Event

When advertising your event, depending on the size of your event, the larger the event the earlier you need to start. For a standard hybrid HIT day, a marketing plan should begin six months prior to the event; with initial steps of reserving the date for the advocacy event, and establish working committees, and schedule your speakers. Three months prior to the event, distribute "save the date" communication to potential attendees/volunteers. It does not need to be lengthy – just the date and a one sentence summary. The second communication comes 2 months out and provides more information including a time and place and maybe some educational points or information on the day's activities. From there, begin weekly advertising/communications all the way until the day of the event. Be sure to include an ad on the actual day of your event. When you send out "save the dates", also reach out to HIMSS for collaboration and assistance with planning and set up. HIMSS can also update both the chapter website and the national events calendar through via e-mail (chapters@himss.org).

Advertising early and frequently is the easiest way to increase attendance and involvement. By establishing planning workgroups or committees you can easily divide and conquer the tasks which arise throughout the planning stages.

Sample Promotion

Chapter Advocacy Day
Dear Member:

Today Healthcare IT advocates from across the state are visiting Capitol Hill to advocate for the value of the electronic medical records and to show the importance of their meaningful use. Their visits, however, can be only as successful as the support received from Health IT professionals from every district that are unable to attend in person. Members of the State Legislature need to see a wide range of support for the Health IT community from their constituents. Today you will have the opportunity to participate in Virtual State Healthcare IT Day.

What does participating in Virtual State Healthcare IT Day entail? Taking one or more of the following actions:

1. Clicking here to send a message to your member of the State Legislature that reinforces what in-person attendees will be bringing to the capitol.

2. Using the hash tag #HIT on Twitter and tweeting the message that health IT provides affordable access to quality care (see what other people are saying on Twitter).
3. Setting up a meeting with your legislator when they return to the district.

For more information about Virtual State Healthcare IT Day, contact XXX at XXX.XXX.XXXX or example@himsschapter.org.

Media Activity

Participation does not end at volunteers. Be sure to reach out to your local newspapers, the AP Wire, local television stations and any other media outlet to gain more exposure. For more information please reference the State HIT Day Guide

Follow Up

A successful event or interaction does not mean communication efforts are over. Plan for follow up and take a long term view. Effective advocacy requires persistence. Following up a successful event with letters, emails and phone calls keeps the issues and discussion in the minds of legislators and their staff. Make sure that you get business cards from any staff members you meet.

Post-Event Strategies

Send a thank you email or letter that briefly outlines the different points covered in the meeting. Thank them for their time and attention and use the exact bill number if applicable. Include any requested information or material along with your contact information. Keep the tone friendly and positive. Follow up the meeting with a phone call. If a staff member or aide handled your meeting be sure to ask to speak to that person. The following is a sample Thank You message:

Sample Thank You Email
Dear [Representative/Senator or Staff Name],

Healthcare reform has been recognized as a priority by President Obama and the White House as well as by the 113th Congress. Thank you for taking the time to meet with me to discuss the benefits of health IT not only to our state but to the nation.

[INSERT ANY FOLLOW UP INFORMATION FROM THE MEETING/SITE VISIT HERE]

Health Information Technology (IT) must be part of the conversation and is an integral building block for comprehensive healthcare legislation. I hope that you will consider me as a local subject matter expert and am willing to help in any way. I, along with the support of the Healthcare Information and Management Systems Society (HIMSS) can help you:

- Organize a healthcare focused Town Hall meeting

- Host you and your staff on a site visit of a local facility using health IT
- Provide written or verbal testimony at committee hearings
- Serve as your subject matter expert on health IT issues
- Analyze health IT legislation that could impact your constituents

I look forward to working with you to help bring our healthcare delivery system into the 21st century.

Sincerely,
[NAME]
 [HIMSS Chapter]

For planning committee members a thank you should go out to all participants from volunteers to speakers. Panelists and speakers take time out of their day to participate in the event and educate attendees. Their involvement can be as important as legislators so they should also be recognized for their time and efforts. Be sure to not only provide a thank you e-mail template but also a hard letter format. Although we rely heavily on technology today, nothing beats an old fashioned thank you letter.

The volunteers are not to be forgotten. Without them, how could you have possibly met with that many legislators in one day? E-mailing the registrants after the event to thank them and provide metrics helps catalyze the crowd for next year.

Virtual Follow Up

Social media campaigns do not end when the event does. Blogging, tweeting, posting and sharing should continue well beyond the day of the event. Embrace the idea of recreating elements of the event after it has occurred by having a participant blog on their experience; having volunteers tweet about their great conversation after legislative meetings; or by sharing any video recorded throughout the day including state government TV channel footage, news channels footage, or personal portable device recordings (with appropriate editing).

Gather Feedback

Following the event, you'll want to collect information to provide event metrics and input from participants. Many teams choose to conduct a survey either on site or online. In the State HIT Day manual there is a sample survey to use for those who participate in legislative meetings. This can be translated into an overall State Health IT Day survey to see how participants enjoyed any speakers or panels, legislative meetings, education sessions and so on.

Following the event it is also extremely beneficial to hold a post mortem meeting. This can cover successes, metrics, constructive criticisms, and lessons learned. Many obstacles faced in planning can be avoided in the following year if it is highlighted and discussed in the post mortem call.

The success of the event can be determined in many ways including by the number of legislators reached (specifically, Health/Public Health/STEM Committee members),

the general attendance numbers, the level of content understanding, and whether event goals were attained.

Report Findings

Advocacy is based upon "spreading the word. Therefore, once you've completed an event you should report your findings. Be sure to post an update on your Chapters webpage, social media, and e-newsletter and to provide an update to the HIMSS Government Relations team. This allows those who were unable to attend to review the information exchanged, the message relayed, and the overall success of the event.

Special Thanks

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