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Lobbying 102: A Guide for Chapter Officers Lobbying with the AMSA Health Policy Action Network





Lobbying 102: A Guide for Chapter Officers

Advocacy Programming at your Chapters

Policy work and advocacy are a passion for thousands of AMSA members. Many AMSA Chapter Presidents are advocacy superstars and awesome at developing local advocacy opportunities and programming that raises AMSA's profile in their schools and energizes their chapters' members. These superstars are a key target for this guide. The AMSA Policy Team hopes to make your life easier by addressing in an easy-to-use way the very mechanical aspects of lobbying. We learned all this from making mistakes, and we hope you won't have to repeat our mistakes. In addition to this guide, HPAN is a great resource for you to organize your own advocacy work. The data collection functions of HPAN will ensure that your (Federal) work will be coordinated with chapters around the country.

For chapter officers who are interested in programming that is not related to advocacy or lobbying, it is likely that there will be at least one person in your chapter who is interested in doing advocacy or learning more about advocacy. It is also likely that there will be at least a few incoming first years who are interested in getting involved in advocacy work. HPAN is an easy, stress-free, and near effortless way for you to engage these members and potential members. We provide all the training and issue briefs, all that you have to do is encourage the members to participate and push their comfort zones so they better develop their advocacy skills.

Importantly, your Regional Director, the HPAN Chair (amsa.hpan@gmail.com), the members of the Policy Team (www.amsa.org/hp), and the Jack Rutledge Legislative Director (jrld@amsa.org) are always available to answer your questions or concerns.

Why Lobby?

To make health care reform a reality, you must convince legislators that your position makes sense. Visiting a legislator is an essential tactic to further your campaign. Lobby visits can be made on the local, state, or national level, depending on the particular issue you are supporting. A lobby visit can be an incredibly rewarding experience, and all medical students should meet with their elected officials to discuss health policy issues.

Why HPAN?

The purpose of HPAN, or the Health Policy Action Network, is to allow AMSA members who are interested in policy or legislative advocacy to engage with this work in a way that is connected and coordinated with the efforts of their peers around the country. While a lobby visit is empowering, a single visit often has little impact in advancing whatever issue prompted the visit in the first place. However, if we are able to grow the volume of visits and figure out a way to share information so that we build on each other's experience, and we add this to the Washington, DC-based efforts of the National Office and to our online activism through our Action Alerts, then we will all have a much greater return on our efforts, that is, we will be more successful in creating laws that put our patients' needs before all else in the healthcare system.

You heard in COC that AMSA programming is coordinated nationally by the AMSA Action Committees. The Policy Team lives within the Action Committees and is comprised of one Chair (the Policy Chair, amsa.healthpolicy@gmail.com), seven topic coordinators (for contact info check out www.amsa.org/hp), the Jack Rutledge Legislative Director (jrld@amsa.org), and several other interns or non-elected leaders. HPAN is a non-official (that is, without elected leaders) structure that lives within the Policy Team. The HPAN Chair reports to the Policy Team Chair and the Jack Rutledge Legislative Director. The main function of the HPAN Chair is to manage HPAN membership and help HPAN members in their lobbying effort in any way s/he can.



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The Policy Team Coordinators are responsible for maintaining the issue briefs and talking points updated on the website. If you want more information on day-to-day activities of HPAN, please contact the HPAN Chair. If you want more information about a particular policy issue, please contact the appropriate Policy Team Coordinator. If you have broader questions or concerns, feel free to contact the Policy Team Chair.

Getting Started

To join HPAN, please have your members fill out the HPAN sign up sheet at http://www.amsa.org/hp/hpan_members.cfm. Any initial questions about joining can be directed to the HPAN chair at amsa.hpan@gmail.com. After filling out the simple online form, they will receive an essay application via email. The application is simply a tool used by the HPAN chair to match individual members' activism styles to make the right "fit" in lobby training, visits, and support. Also, feel free to contact the HPAN Chair at amsa.hpan@gmail.com, AMSA's Policy Chair at amsa.healthpolicy@gmail.com or AMSA's Jack Rutledge Legislative Director at jrld@amsa.org.

Each year, the Policy Coordinators and Action Committee Chairs who are elected at our yearly convention will develop a Legislative Agenda that reflects the principles debated in our House of Delegates. On each plank of the Agenda, the Policy Team will provide on the website detailed info sheets, easy-to-use talking points, and a quick reference to framing the issue. Members of HPAN can use this information, as well as other resources that will be posted online, to educate themselves on the issues.

Everyone has two (Federal) Senators and a Representative. We ask that HPAN members have meetings with the district offices of each. Ideally, HPAN members will meet more than once with each of these offices, but the main purpose of HPAN is to take the stress off lobbying for AMSA members who are excited about doing advocacy work. We would love to see at least one meeting per month, but we will be happy with you working at the level that makes you most comfortable (just remember to push the boundary of your comfort zones so that you can grow as an advocate)

To help keep track of everyone's lobby visits, we ask that each member of HPAN fills out an online form after each visit. This will help us keep on top of AMSA's policy work, help us identify areas we need to strengthen, and give information back to HPAN members about how their efforts connect with those of students around the country.

Making an idea into reality

First of all, lobbying is identical to all other meetings you have had. The biggest differences are

1. You will be talking about Federal policy
2. You will be meeting at an office of someone elected to represent YOU
3. You will come into the meeting with a very specific agenda, your "ask"

Most students have scheduled meetings with deans or professors and before, and most students find these meetings easy and non-stressful. Another difference with lobby visits is that you will be meeting with people who have excellent social and interpersonal skills, so chances are the awkward silences you are used to have with your dean will be absent at your lobby visits. Lobby visits are even easier than meeting with your Dean or with your professors.



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As with any meeting, you have to call ahead and schedule it. You can find the contact information of the district office of the official you are meeting with on AMSA's Legislative Action Center

<http://www.capwiz.com/ams/home/> (click on the "Elected Officials" tab).

- Always ask if it is possible to meet with the elected official her/himself. However, most of the time we meet with staffers.
- Different offices have different titles for the correct staff person you will want to meet with.
- Briefly explain what you will talk about during the meeting to the phone receptionist and s/he will know with whom to schedule you.
- Be aware that the policy staffers are located in Washington, DC. Most likely, if you cannot meet directly with your official, you will be meeting with the "community liaison" or some similarly-named position.
- Often times the Legislative Director will be in the district when the official is not, so you can ask to meet with her/him. The Legislative Director is in charge of the policy personnel in the official's DC office.
- A normal meeting lasts anywhere from 15 to 30 minutes, so plan accordingly.

Choosing an issue

It is normal practice to lobby on more than one issue, but we STRONGLY recommend for you to stick with 2-3 issues if the "ask" is simple and 1-2 issues if the "ask" is more complicated.

As mentioned above, you can find detailed information about all the issues on AMSA's Legislative Agenda on the website. In these info-sheets, we will provide you with a history/context of the issue, where the issue stands now in Congress, and what you should be asking for (your "ask"). Read over the Agenda and the info sheets and decide what best fits your values and interests.

If you have any questions, please contact a member of the Policy Team for help. We can clarify any issue (on the Legislative Agenda) for you, or provide you with more resources if you want to learn more.

We also strongly encourage all HPAN members to stick to the Legislative Agenda use the "asks" we provide. This way, our efforts can be coordinated nation-wide and we won't be accidentally stepping on each other's feet.

Another important point to consider is where your official has influence. If a particular issue is stuck in a committee or subcommittee your official sits on, then lobbying on that issue will have a greater impact than lobbying on an issue that has nothing to do with your official's jurisdictions. However, if you are passionate about an issue...then lobby on it. You can find out on which committee your official sits at AMSA's Legislative Action Center

Getting Ready for the Big Day

While it is always possible to go alone to your lobby visits, it is always more fun to go with a group. Let's talk about both these possibilities. After this discussion, we will discuss the actual mechanics of the visit.

Preparing:

1. You can do some research on the official before you go to the meeting, check out the Open-Secrets website (<http://www.opensecrets.org/>) to see who is financing your official's campaigns (who does she/he owe favors to?). NEVER BRING UP THIS INFORMATION DURING THE MEETING, IT'S JUST USEFUL TO HAVE SO YOU KNOW HOW TO FRAME YOUR MESSAGE



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2. Go to AMSA's Legislative Action Center to research what types of bills your official supports. This will also give you good clues to use.
3. On the day of the meeting, prepare a clean folder with the Issue Brief and information about AMSA (which you can find on the HPAN website). Also, include a business card or a clean, typed sheet with your name and contact information. Feel free to provide contact information for the AMSA's Jack Rutledge Legislative Director. Also include any other newspaper clippings, articles, briefs, or anything else that you think will help this particular office understand your point of view. Remember that the amount of reading is inversely proportional to the likelihood that the staffer will actually read materials (so be brief!). Most importantly, you want to expand AMSA's name recognition and position yourself (and AMSA) as a resource for staffers who want to learn more about our issues.
4. Always keep in mind that our biggest asset during lobby visits is the enormous credibility medicals and premedical students have with the public. AMSA has also cultivated a reputation for only taking positions on issues after thoroughly looking at the evidence. Always be on guard to protect this reputation, and always act professionally.
5. Dress appropriately. Think of what you would wear on the wards with a really strict attending. If you go in a group, wear your white coats (medical students). Business attire is also very acceptable.

If you are going alone,

1. Be sure to understand the background of the issue and the appropriate "ask".
2. Rehearse with a friend before the meeting, and ask your friend to try to distract you with irrelevant pleasantries. (I can't say how often my visits were interrupted with the question, "You are a medical student? That's great! Do you know what type of medicine you want to go into?")
3. Practice getting back on course so that you can give your pitch and make your "ask" in the time available for the meeting.
4. On the day of the meeting arrive early so you have time to clear your mind and mentally go over your speaking points.
5. Give yourself plenty of time to deal with traffic, parking, snow storms, and other stressful situations.
6. Come prepared with a simple, professional thank you card that you can leave with the receptionist. Address the card to the most senior person you met with, thank her/him for meeting with you, and reiterate your "ask". Do not seal the envelope, but write your return address and include your contact information in the card. Offer to answer any questions her/his office may have about this issue or any other health or education issue they encounter.
7. Return to the HPAN website and fill out the post-lobby visit survey. This survey gives us critical information about how legislators feel about our priority issues and how we can better serve HPAN members.
8. Celebrate!!
9. Follow up with a phone call one week later. Remind the person you met with of your meeting, thank her/him again, and reiterate your ask.

If you are going with a group:

1. Meet early with your group so that you can be sure that everyone is on board with the issue and is available to attend the scheduled meeting. It may be preferable to meet first, align your schedules, and then schedule the meeting. It is a good idea to collectively choose the issue(s) you will be lobbying.
2. Divide up the roles of the meeting. Important roles include:



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- a. The person who introduces the issue and gives the history/context
 - b. The person (or people) who presents the argument(s) for your “ask”
 - c. The person who makes the “ask”
 - d. The person who takes notes and records EVERYTHING that the official/staffer says
 - e. The person who will answer any question that falls outside of person “a” or person “b”
 - f. The person who does quality control. After the meeting, this person will go around and say what everyone else did well and what could have gone better. This is an important process, and we diminish the risk of skimping of feedback if it is someone’s job to provide honest feedback.
3. In a very large group, not everyone will get to talk. In a small group, everyone may have more than one of these roles.
 4. Not every role is appropriate for every group; the group should decide how to divide up jobs in the way that best fits the group’s personality and interpersonal dynamics.
 5. It is important that everyone be able to fulfill every role because there is always the risk that someone will have to drop out last minute.
 6. Invite a friend to help the group role-play/rehearse the meeting. Ask the friend to try to distract the group. This will make the real meeting flow well and seem more professional.
 7. Arrange for everyone in the group to meet at the meeting location 30 minutes prior to the meeting. This will give you all time to look over your notes one last time and give a cushion so that no one is late.
 8. Be prepared to take over the roles of anyone who gets stuck in traffic, snow storms, etc.
 9. Come prepared with a simple, professional thank you card that you can leave with the receptionist. Address the card to the most senior person you met with, thank her/him for meeting with you, and reiterate your “ask”. Do not seal the envelope, but write your return address and include your contact information in the card. Offer to answer any questions her/his office may have about this issue or any other health or education issue they encounter.
 10. Immediately after the meeting the group should debrief. In a few minutes, let everyone say what s/he feels went well and what could have gone better. Quickly brainstorm one or two things the group will change for next time.
 11. Celebrate!!
 12. Follow up with a phone call one week later. Remind the person you met with of your meeting, thank her/him again, and reiterate your ask.
 13. Return to the HPAN website and fill out the post-lobby visit survey. This survey gives us critical information about how legislators feel about our priority issues and how we can better serve HPAN members.

The Visit

Depending with whom you are meeting, the visit will have a different flavor.

- Meetings with officials tend to be more superficial, however, the official is the ultimate decision maker on whether you will get your “ask” or not. **COME PREPARED WITH A CAMERA SO THAT YOU CAN HAVE A PHOTO OP WITH YOUR OFFICIAL – THEY LOVE PHOTO OPS AND THIS WILL HELP BREAK THE ICE.**
- Meetings with staffers are slightly more detailed, but staffers often have to check with “the boss” (the official) before they can answer yes or no to your “ask”. It is important to follow up with them to get your answer.



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- Sometimes, more than one staffer is present at the meeting. Try to direct your comments at the most senior staffer because this person will have the most decision-making authority and/or best access to the official who will ultimately make the decision.
 1. Introductions. Everyone in the group should introduce themselves by name. Avoid standing introductions and wait to go around once everyone is seated. If you can't avoid the walking introduction confusion (where no one catches anyone's name), then repeat the introductions once you are around the table.
 2. Engage briefly on small talk (sports, weather, whatever) to establish a rapport and break the ice. Commiserating on how much work we all have is sometimes useful, but may drag on too long. Staffers work at least as hard, if not harder, than residents.
 3. Introduce the topic. Look over the issue talking points and framing guide for more information on how to present the issue. However, always try to connect the issue to something emotional. Facts and Stats do not bring people into your issue.
 4. Give the case for your "ask". Be direct and be succinct. Try to engage the person you are meeting with. Try to connect with their values.
 5. ALWAYS MAKE YOUR "ASK". The "ask" is a yes/no question that sums up why you are doing this visit.
 - a. "Will the Member cosign bill x?"
 - b. "Will Senator _____ vote YES on bill y?"
 - c. "Will Rep. ABC sign the Dear Colleague letter directed to Rep XYZ?"
 - d. "Will Senator _____ introduce legislation that will _____?"
 6. ALWAYS HAVE A FALL BACK "ASK". You never want to leave on a "no". If you do get a negative response to your first ask, try to figure out what the contention is, take note of it, and ask for a follow-up meeting. Everyone always says "yes" to a follow up meeting.
 7. Do not debate during the meeting, but ask enough questions so that you are clear on the office's position on your issue. Feel free to ask what changes would be needed on the bill so that the office would support it.

Keeping Perspective – Dealing with less-than-hot meetings

- Every so often we encounter in lobby visits staffers who are jaded, burned out, frustrated, and/or extremely tired and stressed out. Unhappy staffers are difficult to deal with. The best way to deal with them is to keep your cool, be as professional as you can, state your point, make your "ask", and be polite. The insightful ones will mellow out during the meeting. Sometimes, because people trust medical students, the issue may get totally derailed as the staffer pours out her/his heart to you. These are difficult situations, but be empathic, compassionate, and try to return to your original agenda.
- If your official or her/his office is dead opposed to AMSA's position on an issue, the visit can be frustrating. However, it is useful to lobby opponent politicians because the language they use during the meeting gives us insight into how they will try to frame their arguments to the general public. When lobbying opposing politicians, be especially careful about taking great notes and transmitting these on the post-lobby survey on the HPAN site. Your not-so-hot experience will help inform students in other parts of the country – your time is not wasted, even if you get a big, fat "NO".

Variation – Meeting with candidates

- In this upcoming election season, you may have the opportunity to meet with candidates for congressional office in addition to meeting with office holders.



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- The benefit of doing this is that you can help shape the candidates' original opinion on your issue
- In addition to a one-to-one meeting, consider attending public events with the candidate and asking pointed questions that includes your "ask".
- Contact the AMSA Jack Rutledge Legislative Director, jrld@amsa.org, for more information on how to do this.

Goals

What are some of the things we hope will happen:

1. You link up with hundreds of other AMSA students and help make the world a better place
2. You will improve your lobbying skills with each visit you go on (the first two visits are scary, and then they become routine and much more fun)
3. You will develop a relationship with specific staffers in your officials' offices and carry these relationships into your post-AMSA advocacy.
4. You will come to AMSA's National Convention and experience the awesomeness that is AMSA.
5. You will have a lot of fun while learning about policy work and doing work that is politically very important.