



TIPS FOR SUCCESSFUL ADVOCACY

2023 EDITION



Welcome to the Nassau County Medical Society Advocacy Guide

****This is a guide that NCMS has formulated and follows during the entire year.****

Advocacy Day is ***one major*** activity in our society's year-round plan to create and maintain relationships with the representatives of our legislature.

Remember, your professional expertise makes you a valuable resource on physician and patient-related issues for the members of the NY Senate, Assembly and beyond.

In the next pages you will find suggestions to help you prepare for the legislative meetings and some ideas for follow-up activity.



Pre-Meeting Preparation

- Become acquainted with MSSNY's and Nassau County's priority issues by reviewing the policy materials shared with you.
- Generally, you can expect 15-20 minutes of the Member's time. Since his or her time is limited, be sure to be accurate, brief and try to tell your Member something new (e.g., a story on how it affects constituents).
- Focus your research/homework on each Member's committee assignments, political orientation and priorities, election issues, etc.



TIP: *If you cannot get your Member's attention in 30 seconds, you have not focused your message.*



Day of the Meetings "Advocacy Day"

- At the meeting, take care of business. While you want to always be respectful of your Member, remember that you have a purpose and an agenda. Try to keep introductions brief to optimize time. Personalize your remarks by highlighting the specific concerns of local physicians and their patients. Stories are important for several reasons:
 - Real-life situations demonstrate the problem.
 - Stories make your issue memorable, give it credibility, are easier to remember and cut through information overload. You are taking a statistical abstract and turning it into a human problem.
 - Politicians are people. While they are interested in numbers and the broad scope of things, they respond more to their constituents.
- Take advantage of this opportunity to discuss issues with your lawmakers and their staff by being as specific as possible in what you are asking them to do.
- **PLEASE MAKE NOTE:** STAY ON TASK. IN THESE MEETINGS YOU ARE REPRESENTING MSSNY AND NASSAU COUNTY. THIS IS NOT AN INDIVIDUAL MEETING. FOR ANY PERSONAL CONCERNS YOU WOULD LIKE TO DISCUSS YOU CAN PLAN A SEPARATE MEETING WITH THE MEMBER AND HAVE AN IN-DEPTH DISCUSSION.
- End the visit by soliciting the Member's views of each issue you have discussed. If there is disagreement, listen to his or her perspective and then present your views. You will enhance your effectiveness if you can demonstrate a willingness to participate in a friendly exchange of ideas. **If there is agreement, get the Member's commitment to take the specific action(s) requested on each issue (e.g., cosponsor a bill).**
- As you conclude the meeting, give the Member and/or staff copies of the MSSNY fact sheet and any other information pertinent to the matters you discussed. Thank the Representative for his or her time and offer to be a resource to him/her on physician and patient issues.

Do not be disappointed if the meeting is cut short or staff conducts the visit rather than the Senator or Assemblyperson. Staff members typically are instrumental in shaping the Member's views and can be valuable resources for the county. Members often have unpredictable schedules that include votes on the floor of the House and Senate.

TIP: As a volunteer Advocate, it is your job to humanize the issue.

Post-Event Follow Up

Meeting Follow-Up

Within two weeks of Advocacy Day, send follow-up “thank you” emails to the Members and/or staff with whom you met. (The Executive Director does this on behalf of the county.) The email usually recaps the highlights of your meeting, including the specific actions the Member committed to taking, and thank the Member and/or staff for their time. Reiterate your offer to be a resource for advice on physician and patient-related issues.

It is what you do after

Advocacy Day that

will determine your

success at getting

what you asked for.





Actions Beyond Advocacy Day

- **Nassau County Newsletter Article:** Draft an article for the next county newsletter on your advocacy day visits. Include your legislators' positions on top issues. Include thanks to any legislator who has taken the requested action and supports one or more of MSSNY and Nassau County issues. If you thank a legislator in the article, send a copy of it to the legislator's office so he or she knows your county is aware of his or her work. MSSNY and Nassau County will post pictures of the meetings on all of their social media platforms and their website.
- **In-District Meetings:** Continue to make personal visits with legislators after Advocacy Day. Personal visits are your best opportunity to discuss specific issues and to enhance the likelihood that you will be remembered. Schedule visits with your Members over recesses (see the congressional calendar **HERE**). Members have at least one home office that is listed on their Web page (www.nysenate.gov/ or www.nyassembly.gov/). Members typically can spend more time meeting with constituents at home, and such meetings tend to be more focused and meaningful.
- **Nassau County Society Meetings:** Invite your elected representative to speak at your monthly or membership meeting or other society forums. These settings provide an excellent opportunity for an exchange between the lawmaker and NCMS participants during "question and answer" sessions. County Medical Society meetings are also an excellent forum to highlight state and national issues, and what actions need to be or are being taken. In addition, having a legislator at a meeting provides an excellent opportunity to recruit new member advocates.
- **On-Site Visits:** Invite a member of your congressional delegation or his/her staff member to your office, hospital, or clinic for an on-site visit. By showing him or her examples of the day-to-day concerns of patient care delivery, you enable them to become especially sensitive to practice issues.

TIP: *There is only one time to lobby - year-in, year-out, and year-round.*



Actions Beyond Advocacy Day *(continued)*

- **Town Hall Meetings:** Participate in local town hall meetings arranged by your legislators or state medical association. Participating in town hall meetings also helps educate others in your state about the Medical Society's issues. To find out when your legislators are holding public meetings, sign up for their newsletters (check their Web pages), or contact their local district or state offices. Ask your members' staff if they have a mailing list for healthcare issues.
- **Physician Advisory Committees:** The NCMS has a standing Legislative and Physician Advocacy Committee on which you can volunteer to serve. Others hold "Doctors Roundtables" and other meetings with physicians. Check with your member's district office to see if and when your legislators have such a forum. If your member does not have such a forum, suggest that he or she initiate one. Offer to assemble a group of physicians (and other health care professionals) who could advise your member on health-related issues.
- **Alerts:** MSSNY and NCMS sends Legislative Alerts to members when it is critical for congressional offices to hear from constituents. Senate and Assembly offices use constituent letters, faxes, phone calls and e-mails to gauge constituent opinion on specific issues. The more personalized the message, the more weight it is given. Remember, each issue has more than one side. Senate and Assembly offices are also hearing opposing views. Do not be offended if you receive a form letter in response. Members must answer thousands of submissions a week.
- **Hold a debriefing session with Advocacy Day participants to evaluate your society's participation:** Discuss ways the society can make its future participation more valuable and develop recommendations on enhancing the infrastructure that already exists. The debriefing could be done over a conference call or a face to face meeting. A summary created from the discussion should be shared with MSSNY.
- **Write a letter-to-the-editor, "Op-Ed" or press release:** Working with the media can impact public policy. Media coverage reaching a large group of constituents focuses public attention on an issue and can influence the outcome.

TIP: *All things being equal, politicians will go with the flow.
Our job is to create the flow.*



Facts of the Legislative Process

- **Bill Introduction/Sponsorship:** Legislators can be encouraged to introduce a bill to address a specific issue, or to co-sponsor a bill introduced by another senator or representative. Obtaining a large number of co-sponsors on a bill is one strategy for gaining attention and credibility for an issue.
- **Subcommittee:** A crucial time for constituent involvement is when a bill is in the sub committee stage. This is the stage when legislators begin evaluating specific bills, policies, and legislative language. Grassroots advocates can communicate their positions on the issue and suggest specific provisions or language. Action by constituents of subcommittee members can be highly effective at this point.
- **Full Committee:** Grassroots advocacy at the full committee stage is also particularly important. This stage typically follows subcommittee consideration of bills and policies, but not always. Communications may focus on supporting or opposing specific language developed by the subcommittee; encouraging legislators to sponsor amendments; and asking the committee member to vote for or against the bill. Again, action by constituents of committee members can be most effective.
- **Floor:** Constituent communication with all senators and representatives is important when legislation comes to the House and Senate floor for a vote. Grassroots efforts at this stage focus on encouraging a legislator to either vote for or against the bill; to sponsor a floor amendment; or to vote for or against a floor amendment offered by another legislator.
- **Conference Committee:** Opportunities for grassroots impact are more limited at the conference stage. Conference committees convene to work out the differences between similar bills passed by the House and Senate. However, grassroots communications - particularly from constituents of conferees - may influence whether the House or Senate provision is accepted in the compromise bill. Once a conference committee has worked out the differences between the House and Senate version of a bill, a final reconciled version is typically then presented for a vote in each chamber.

Titles and Job Functions of Congressional Staff

- ▶ **Chief of Staff (COS) or Administrative Assistant (AA):** The COS reports directly to the senator or representative, and usually is responsible for evaluating the political aspects of various legislative proposals and constituent requests. The COS usually manages the overall office operations, including the assignment of work and the supervision of key staff.
- ▶ **Legislative Director (LD), Senior Policy Advisor:** The LD is usually the senior staff person who sets the Representative's legislative priorities and makes recommendations for action on particular issues. Senior Policy Advisor is sometimes used for committee staff.
- ▶ **Legislative Assistant (LA):** In most congressional offices, there are several LAs and responsibilities are assigned according to particular expertise in specific areas (e.g., health, tax, environment, energy, etc.).
- ▶ **Legislative Correspondent (LC):** The legislative correspondent reads, logs and tallies letters and other written correspondence from constituents and usually drafts the reply on the legislator's behalf.
- ▶ **Press Secretary or Communications Director:** The press secretary's builds and maintains open and effective lines of communication between the Representative, his or her constituency, and the general public. The press secretary knows the benefits, demands, and unique requirements of both print and electronic media, and how to promote the Representative's views or positions most effectively on specific issues.
- ▶ **Scheduler, Appointments Secretary or Personal Secretary:** The Scheduler is responsible for managing a legislator's time (e.g., congressional responsibilities, staff requirements, and constituent requests). The Scheduler may also be responsible for making necessary travel arrangements, arranging speaking dates, visits to the district, etc.
- ▶ **Caseworker:** The caseworker is the staff member usually assigned to help with constituent requests by preparing replies for the Representative's signature. The caseworker's responsibilities may also include helping resolve problems constituents present in relation to federal agencies (e.g., Social Security and Medicare issues, veteran's benefits, passports, etc.). There are often several caseworkers in a congressional office.



GLOSSARY

OF KEY TERMS



Glossary of Legislative Terms

- **Bill:** A proposal to change the law.
- **Amendment:** A change of a bill, motion, act or the Constitution.
- **Appropriation:** A formal approval to draw funds from the Treasury for specific purposes.
- **Authorization:** A law creating a program and outlining funding. The authorization to actually draw funds from the Treasury and the amount to be drawn are established by an appropriation.
- **Budget:** The President's annual proposal to Congress, usually submitted in early February, for federal expenditures and revenues for the coming fiscal year (which starts October 1).
- **Budget Resolution:** House and Senate-passed guidelines, and later caps, on federal budget authority and outlays. The Budget Resolution is not submitted to the President for signature or veto. It is considered a matter of internal congressional rules and procedure. Bills that would exceed budget caps are subject to a point of order - although waivers have been granted regularly in both House and Senate.
- **Conference Committee:** The House and Senate appoint conferees to a conference committee to resolve differences between House and Senate-passed versions of the same legislation.
- **Conferees:** Senators and representatives appointed to serve on the conference committee.
- **Co-sponsor:** One or a group of senators or representatives who introduces a bill for consideration by Congress. The initial sponsor of the bill may send a "Dear Colleague" letter asking other Senators or Representatives to join in sponsoring the proposal. A large number of co-sponsors increase a bill's chances for consideration.
- **Filibuster:** A delaying tactic to prevent action in the Senate by speaking continuously. It takes sixty votes to end filibuster.
- **Fiscal Year:** The federal government's fiscal year runs from October 1 through September 30.
- **Hearing:** Meetings of committees or subcommittees to gather information on the ramifications of proposed legislation, investigate problems, or explore issues.
- **Lame Duck:** A member of Congress (or the President) who has not been re-elected, but whose term has not yet ended.
- **Majority Leader:** The leader of the majority party in the Senate is called the Majority Leader. The Majority Leader in the House is second in command of the majority party, after the Speaker.
- **Mark-up:** After hearings, members of a committee or subcommittee examine a proposed piece of legislation line-by-line to determine what additions, deletions, or amendments should be made. This activity is referred to as "markup". Often the chairperson of the subcommittee will draft a starting proposal, referred to as the "chairman's mark."
- **Minority Leader:** Leader of the minority party in the House or Senate.
- **Point of Order:** An objection by a member of Congress that the pending matter or proceeding is in violation of the rules. The presiding officer accepts or rejects the objection, subject to appeal by the full House or Senate. The power of the presiding officer to rule on points of order, however, is stronger in the House than the Senate.
- **Report:** A printed record of a committee's actions and views on a particular bill or matter.
- **Speaker of the House:** Presiding officer of the House, leader of the majority party in the House, and next in line to the Vice-President for succession to the presidency. The Speaker is one of the most powerful offices in Washington.
- **Sponsor:** The representative or senator who introduces a bill or resolution.
- **Whip:** Senator or representative who serves as an internal lobbyist for the Republican or Democratic party to persuade legislators to support the party position, and who counts votes for the leadership in advance of floor action.



Online Advocacy Resources

From NY State

- **NY State Department of Health:**[Policy and Standards \(ny.gov\)](https://www.ny.gov/policy-and-standards)
- **NY Public Health Law:**[Public Health Law - New York State Department of Health \(ny.gov\)](https://www.ny.gov/public-health-law)
- **Standing Committee on Health (Assembly):**[Standing Committee on Health | Committees | New York State Assembly \(nyassembly.gov\)](https://www.nyassembly.gov/committees)
- **Health Committee (Senate):**[Health | NY State Senate \(nysenate.gov\)](https://www.nysenate.gov/health)

From the Federal Government

- **WhiteHouseHealthReform**
www.healthcare.gov/
- **HouseofRepresentatives**
www.house.gov/
- **Senate**
www.senate.gov/
- Legislative information from the**Library of Congress**: Track the status of bills,votes and access information on your members of Congress.
thomas.loc.gov/
- **CentersforMedicareandMedicaidServices**:Includes Medicare regulations, press releases, studies, etc.
www.cms.gov/default.asp
- **MedicarePaymentAdvisoryCommission**(MedPAC): Advises Congress on Medicare issues.
www.medpac.gov/