



## **California Physical Therapy Association's**

### **Guide to Effective Grassroots**

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## **What is grassroots?**

A grassroots movement is one driven by the constituents of a community. Often grassroots movements are at the local level and are organized to support the common interest of a particular group.

The government has a tremendous impact on the profession of physical therapy. Physical Therapy is a profession that is directly affected by legislation. Unlike other healthcare professions, you have the opportunity to be a voice for physical therapy in your community. This is a great advantage! You can impact the future of physical therapy.

## **The importance of effective grassroots**

Organizing and maintaining effective grassroots advocacy is imperative to our success. Having a local grassroots movement allows physical therapists to have an influence in the most direct way. State legislators hear from various healthcare professionals on a daily basis. An effective grassroots program gives physical therapy the opportunity to stand up to competing interests as they relate to healthcare. Grassroots is about getting the word out. As a professional healthcare provider you are already a well respected member of your community. It is possible that you are advocating for the profession without even knowing it. You may be treating elected officials in your neighborhood. You probably have friends and patients already talking about the benefits of physical therapy. You may even have a close friend elected into a local office. The list goes on.

CPTA is dedicated to protecting the profession of physical therapy. CPTA management staff and advocates are actively working to ensure that the interests of physical therapists are well represented in Sacramento. In the capitol we meet and discuss physical therapy on your behalf day in and day out. Effective grassroots at the local level validates our efforts in Sacramento and allows you to bridge the gap. It is important that a consistent message is being heard by our legislators at home and in capitol.

This guide provides you with tips and tools that will help you produce effective grassroots in your community. It will allow you to take initiative in your CPTA district and carry the torch for your fellow members. This guide will give you the tools you need so you can make a difference in your own backyard.

## **Organizing a strong grassroots campaign in your community**

Organizing a strong grassroots campaign in your own backyard is the key to success. There are members like you who are eager to become involved. CPTA is comprised of 12 separate districts all working locally to bring the association and its benefits closer to you. Please visit the California Physical Therapy Association website ([www.ccapta.org](http://www.ccapta.org)) to view your district chairperson.

### **Make the connection:**

Connect with your fellow physical therapists, physical therapist assistants and physical therapy students. Talk to everyone at your district meetings and town halls. Find out who is passionate about advocating for the profession.

Exchange email addresses and phone numbers with fellow members who are eager to get involved. Using the internet is the most effective way to communicate with a group of your colleagues. Start an email network or email "tree" that can keep everyone up to date on upcoming events, fundraisers and meetings in your district. Most CPTA districts already work with an email network. If you are not yet tuned in to what is happening in your district contact your district chair by email.

The CPTA office in Sacramento can also provide you with various materials to help get your advocacy campaign up and running. There are a number of ways to start advocating for the profession of physical therapy. Contact Albert Parnell at [aparnell@ccapta.org](mailto:aparnell@ccapta.org) or (916) 929-2782 to find out how you can join your district's local grassroots movement today.

## How to meet with your local legislator

Not sure who your local representative is? Visit the [Legislative Action Center](#) at [www.ccapta.org](http://www.ccapta.org) to find out.

### What can you do to help?

The CPTA management staff and Government Affairs Committee understand that you are already a highly active member of your community. The majority of your day is dedicated to serving the healthcare needs of patients and educating future physical therapists and physical therapist assistants. Although your time is spread fairly thin between your various daily responsibilities there are a number of tasks you may perform that will make you an asset to CPTA grassroots efforts.

### Why should you meet with your local legislator?

- ❖ Building statewide influence begins at the local level. That means in order for CPTA to be recognized and respected by state decision makers, members must demonstrate their value to their legislators at the local level (their home district).
- ❖ Building awareness about PTs and their value to the community is a potent weapon, and accomplishing this goal has the added bonus of helping PTs win favor for local issues as well.
- ❖ District office meetings with local legislators are a good chance to get to know your representative. Introduce yourself and share why physical therapy is important and a valued health care benefit to the legislator's constituency.
- ❖ Explain the intent of the consumer direct access legislation: It will save patients time, money and unnecessary physician referrals that limit access and result in higher patient costs. It allows PTs to do what they already have been trained and educated to do. Let the legislator know 43 other states allow some form of consumer direct access to physical therapy. 16 of those states have unlimited access and California needs to do the same.
- ❖ Know your legislator's background: whether he/she is well versed on health care issues, has taken a position on the issue or has heard of the legislation. Be direct, clear and brief and keep in mind the legislator's time is limited. Study the CPTA key messages, fact sheets and frequently asked questions beforehand, all of which are available at [www.ccapta.org](http://www.ccapta.org)
- ❖ Consumer direct access represents a **common-sense solution** to California's current complicated and costly maze of healthcare delivery. **Patients should have access** to quality healthcare providers of their **choice**. Physician objections to direct access for physical therapy **will impede, rather than enhance**, patient access to quality care. Licensed physical therapists set the highest standards in patient safety and numerous studies attest to that

## Contacting Your Local Representatives:

Our state legislators are elected into office to represent the interests of their constituents. That's you! Your local representative is eager to hear your interests. Introduce yourself as a physical therapist and discuss what is most important to you. There are a number of ways you can do this.

- ❖ EMAIL, MAIL or FAX—Write a personalized letter introducing yourself, what you do and where you reside. Offer yourself as a resource to your legislators on healthcare issues. If sending your letter by mail or fax, feel free to include the direct access fact sheet or *MoveCalifornia* information. The CPTA website, [www.ccapta.org](http://www.ccapta.org), is full of information and resources for you to use in writing your letter. If sending by email, consider including a link to the CPTA website and encouraging your legislator to visit.
- ❖ FACE-TO-FACE MEETING—CPTA is committed to making face-to-face visits with legislators as simple as possible. We will schedule the meeting for you, a friend, or a group of members. In addition, you may attend a political fundraiser to build a relationship with your legislator. CAL-PT-PAC will even pay for your entry in to the political event! We will provide you with resourceful information to prepare you for your district meeting. Remember, at an event you are not meeting to discuss specific issues or interests.

That's it. Easy! It's no different from greeting a new patient for the first time. They may call you at a later date or they may not. The important thing is that you have extended the offer and paved the way for future conversation. It is time the California legislators get to know who physical therapists are and how hard you work for their constituents.

## Do's and Don'ts

### Do:

- ❖ Arrive a few minutes early for the meeting.
- ❖ Come prepared with materials to leave behind including a business card and a summary of the key issues you want to get across during the meeting.
- ❖ Thank the legislator or staff member for their time.
- ❖ Send a thank you note or letter thanking them for meeting with you (reinforces what you had to say, develops relationships.)
- ❖ Limit what you have to say to three main points. Keep it short and concise. Legislators and staff members have dozens of meetings every day, five days a week, so pick out the most critical points.
- ❖ Ask them directly to support or oppose legislation if you are talking about bills (They may not be able to give you a definitive answer, but it is always important to ASK that they vote your position on an issue.)
- ❖ Share personal stories about how an issue impacts you. This is very effective and is something that a legislator or staff member is likely to remember.
- ❖ Be gracious and flexible. It is fairly common for legislators or staff members to be running late. Just go with the flow and understand that they have lots of demands on their schedule.

## Don't:

- ❖ Show up without a meeting (their schedules are jammed packed and have many meeting requests to accommodate).
- ❖ Show up late. This doesn't send a very good message. If you absolutely can't avoid it, call and let the office know.
- ❖ Show up with more than five people to a meeting. Many offices are very small and legislators or staff will be more at ease meeting with a group that fits in their office space.
- ❖ Don't be upset if you meet with staff member and not a legislator. Staff reports all their meetings and what took place with their boss. Often times, staff has worked in the capitol longer and has just as much knowledge and sometimes even more knowledge on issues than a legislator. Meeting with staff is also very valuable.
- ❖ **Do not discuss fundraisers or contributions** in meetings with legislators or staff in the capitol or district offices—this is not allowed and will make legislators and staff very uncomfortable. Legislators can get in a lot of trouble for this. Make sure to stick to legislation and policy matters.

## Writing effective letters to your legislators

Visit the Legislative Action Center at [www.ccapta.org](http://www.ccapta.org) to view letter templates that are available for immediate use. Keep in mind; the more personal you make your letter the better! Here are some helpful tips.

- ❖ You can find your legislators contact information by accessing their personal website or visiting [www.leginfo.ca.gov](http://www.leginfo.ca.gov).
- ❖ Use your own words on your own stationery.
- ❖ Address letters to your own legislators or members of Congress, or to committee chairs.
- ❖ Keep your letter short and clear.
- ❖ Identify bills by title and number.
- ❖ Make sure your letter is timely. Write your letter when legislation is pending in committee.
- ❖ State reasons for your position. Tell how the issue affects you, your business, your patients and your community.
- ❖ Use the proper form of address.

## Volunteering for a local candidate

- ❖ With frequent elections there are always opportunities to volunteer for a local candidate. When you volunteer your time to a campaign your participation will not be forgotten. Getting involved at the earliest stages of a legislator's career shows your loyalty and commitment.
- ❖ Contact the local candidate's campaign headquarters. Let a staff person know you support the candidate and would like to help in any way you can.
- ❖ Answer telephones or place calls. Ask the staff person or candidate for their voter outreach call time schedule. If you have the time stop by one evening and help make phone calls.
- ❖ Participate in a "Day of Action" – Candidates will usually schedule weekends where the community can get involved in their campaign efforts. This usually entails a few hours of your time over a specified weekend where you can stuff envelopes, make phone calls, walk voting precincts and distribute campaign literature and materials.

Call the local campaign office and ask them to keep you posted on these types of events and others involving your local candidate.

- ❖ Join the candidate's email distribution list by visiting the candidate's website.
- ❖ If you are short on time, offer to donate various office materials such as paper, writing utensils, desks, phones, chairs etc. Search your own office or home and determine what you can spare for the duration of a campaign.

## **Making contributions**

**Donate money to the campaign** – Make a contribution online or attend a local fundraising event for the candidate. Making a monetary contribution will help the candidate or representative finance his/her campaigning efforts.

**Help raise money** – Maximize your contribution capabilities. Talk to other physical therapists and physical therapist assistants about your support for a local candidate. Raising money for a candidate makes you an asset to the campaign and allows the physical therapy community to be easily recognized.

## **How to host a successful fundraising event**

### **Prior to the event**

- ❖ Identify the legislator, elected official or candidate for whom you would like to host an event.
- ❖ Contact Albert Parnell at the CPTA office at [aparnell@ccapta.org](mailto:aparnell@ccapta.org). He can assist you with all aspects of planning and organizing a local fundraising event.
- ❖ Establish a fundraising goal. How much money can be raised at your event?
- ❖ **Identify where you would be willing to host the event, in your home, or place of business.** Preferably, the event is located in the legislator's district, but just outside of the area or the general vicinity is often acceptable, as well.
- ❖ **Set date and time for event** – Typically, a weekday evening event is best, such as from 5:30 – 7:30 p.m. or 6:00 – 8:00 p.m.
- ❖ CPTA staff will connect with the fundraiser to identify dates that the legislator is available for the event.
- ❖ **Invitations.** The CPTA office can supply you with invitations for your event and work with you sending them out.

As the host, you have a variety of responsibilities. First, the host should have the location prepared for the event, including any necessary food and beverages. Appropriate food and beverages include: bite size appetizers, cheese, fruit, finger sandwiches, wine, soda, coffee, tea, etc. (These can either be part of the host's donation to the event. The host may also discuss the possibility of a food and beverage sponsorship on behalf of the CAL-PT-PAC. Reception costs must be kept at or below \$500 to avoid reporting.)

Secondly, the host needs to take ownership of the event and assist in publicizing the event, along with getting people to attend. Third, the host must make personal follow-up calls to contacts to get people to attend. Often this requires multiple contacts for each person. CPTA can assist with this but it is the host's responsibility as well. Fourth, the host is responsible for introducing the legislator around at the event and introducing him/her before the legislator speaks at the event.

## EVENT TIMELINE

### **One month or more prior to the event**

Invitations should be sent out to physical therapists in the area, family friends, other health care providers, and community leaders. CPTA can assist in sending out the invitations directly, or providing you with PT constituents who may be interested in the event. The broader the list of invitees, the better.

### **Two weeks prior to the event**

- ❖ Reminders should be sent out to your targeted list. Encourage people to make a contribution even if they are unable to attend. The more personal the request—calling someone on the phone rather than an email that they can ignore—the better. PEOPLE NEED REMINDERS ABOUT THE EVENT.
- ❖ The host should secure a copy of the legislator's biography so that he/she can familiarize themselves with the legislator and introduce them at the event. You can request this from CPTA staff or go to [www.assembly.ca.gov](http://www.assembly.ca.gov) or [www.senate.ca.gov](http://www.senate.ca.gov), locate the legislator's webpage and find the biography.

### **One week prior to the event**

- ❖ Make more follow up calls, send reminder emails, and ask people to attend the event. Again, if someone is unable to attend, ask them to make a donation anyway. Reminders should be sent out to people who have already RSVPd.
- ❖ **Find out if the legislator has any time constraints that evening** i.e., if the event is from 6:00 – 8:00 p.m. but the legislator can only be there from 6:00 – 7:00 p.m., this is important to know. Encourage guests to get there early so that they can meet the legislator. This will also help the host with the timing of the program the day of the event.

### **Day of the event**

- ❖ Name tags and pens should be available for guests including the legislator. This will allow the legislator to learn people's names more easily and for guests to mix and mingle who may not know each other.
- ❖ Have extra copies of the contribution form available for people to fill out if they have not yet made a contribution. Also provide a guest sign in sheet for guests to sign as they arrive. It is helpful to have a greeter present to ask people to sign in, hand out nametags and take contributions.
- ❖ The host should make sure that the legislator is introduced to all the guests. About halfway through the event, the host should gather the guests together, briefly introduce the legislator, and ask him/her to say a few words. It is also a good idea for the guests to introduce themselves, where they work, and how long they have been practicing physical therapy. After the legislator has addressed the group, guests should feel free to ask questions. After this, guests can mix and mingle some more, or this would be an opportunity for guests to leave.
- ❖ Before the legislator leaves the event, the host can give the legislator the checks that have been collected. Checks can also be mailed to the fundraiser's address. The host and CPTA staff should keep record of those who have contributed along with the total for future reference.

### **General things to keep in mind**

- ❖ Ideally, you want to have at least 20-30 people at a fundraiser (although this varies depending on the size of the venue. More is even better. Legislators often ask how many people are attending the event and we want this number to sound impressive.)
- ❖ If you are unable to get 10 people to attend, you may need to consider postponing the event.
- ❖ **DO NOT DISCUSS SPECIFIC LEGISLATION AT A FUNDRAISER.** It is okay to discuss general concerns such as the current requirement that patients must receive a referral from a doctor prior to receiving physical therapy services, but never mention legislation by bill number. **NEVER ASK A LEGISLATOR OR STAFF MEMBER AT A FUNDRAISING**

**EVENT DIRECTLY TO SUPPORT OR OPPOSE LEGISLATION.** Mixing legislative business and campaigning is illegal and should be kept separate.

- ❖ It is a great idea for guests to mention at an event that you would like to **schedule a follow up visit with the legislator in the District or Capitol office** to discuss an issue. But again, do not directly ask for a legislator's support or opposition of legislation at a fundraiser. *It is against the law.* One of the primary purposes of the events is to establish a relationship with the legislator so follow up visits are strongly encouraged.
- ❖ **Please Note:** Lobbyists may not contribute to the candidate and it is better if the lobbyist not be directly involved in the arrangements, although there is no prohibition of it.