



WELCOME TO THE
**LEADINGAGE MICHIGAN
ADVOCACY TOOLKIT!**

Whether you are new to advocacy or a longtime participant, this guide offers practical tools to help you share your story, build relationships with policymakers, and take action with confidence. Together, we can strengthen aging services and make a meaningful difference in communities across Michigan.

– Dalton Herbel

INTRODUCTION

What is Advocacy?

Advocacy means lending your time, treasure, or voice supporting something or someone and attempting to persuade or educate others of the importance of that cause, issue, or topic. Advocacy is a group effort focused on influencing particular public policies. It is an effort to shape government policy openly and transparently and represent the views of a specific group by making their positions known to legislators, regulations, and other policymakers.

Why Advocate?

Public policy affects our profession and those we serve through funding, regulations, and quality ratings. Often these policies have been developed without full consideration of their effect on providers, seniors, families, and caregivers. LeadingAge Michigan is working to change that by helping members engage in effective education and grassroots advocacy. We know legislators and policymakers will continue to implement policies related to senior care and services, as Michigan, and our country continues to age. It is up to us to help craft health policies to support consumer access, quality care, and adequate funding across the full continuum.

Use This Guide

This guide is designed to help members prepare for a grassroots advocacy campaign, communicate with policymakers and ensure their advocacy is effective and efficient.

Use of the resources in this guide will support your efforts and help create advocates of your residents, families, and staff to make the most of your time. We plan to make these templates and up-to-date tools available to you on the LeadingAge Michigan website. These resources will prepare you to be an effective and trusted resource on issues related to LTC supports and services.

Preparing to Meet Your Legislator

Contact with elected and appointed officials can be made through letters, phone calls, and e-mail; however, a personal visit often provides the most effective political action. Direct, personal lobbying can make a significant difference in a legislator's vote or a bureaucrat's action. Don't be afraid to meet with legislators. Once you have done it, each successive visit will get easier. When you arrive to meet with your representatives or senators, you will be working with one or more staff members. This is especially true in federal congressional offices where the policy workload is assigned to staff members by specific issue areas, such as Social Security, the elderly, health, or Medicare. Lobbying your elected officials is an ongoing process. You will want to establish a trusted relationship before a crisis arises. Tip: Consider assigning someone in your organization the responsibility of maintaining a clipping file on your legislators.

INTRODUCTION (CONTINUED)

Likely you know more about a given topic than your legislator or members populating a committee holding hearings on a particular issue. This is indicative of the substantive issues with which legislators deal. Continue to keep your legislator informed of your perspective of developments on the issue after your initial visit.

LeadingAge Michigan members can also provide visibility to their local elected officials. State legislators, and any elected official, need opportunities to meet their constituents. The occasion need not be formal. It need not be a situation where constituents present a list of concerns. LeadingAge Michigan members can consider their organization as a very visible business within a legislator's district. In many cases, the LeadingAge Michigan member may even be the largest employer within a district.

Long-term care providers have residents, staff, volunteers, and trustees – people who are influential community leaders, potential voters, and valuable resources to the legislator. Members should always consider inviting legislators to their facility/agency for a relaxing time within your community.

You may want to hold a town hall meeting or have written correspondence for the candidates of both parties during any given election cycle. To that end, we have drafted some sample questions to mail to candidates to solicit their written positions.

When holding an on-campus event, consider assigning someone to the legislator upon arrival to ensure an introduction to as many people as possible. Make an effort to see that your legislator and other guests are publicly acknowledged. Have photos taken and send copies to the LeadingAge Michigan office for inclusion in LeadingAge Michigan's newsletter and/or to your local newspaper for publication. And, always review the Before, During, and After Advocacy Checklist to make sure you did not miss anything.



ADVOCACY CHECKLIST BEFORE, DURING AND AFTER

A personal visit with your Representative or Senator, either in Michigan or in your state/federal capitol can be exciting and rewarding. Following are some steps and tips to make such a visit most effective.

Before your visit:

- 1** Visit the web to know who your elected officials are at Michigan House of Representatives and Michigan Senate website.
- 2** Make an appointment ahead of time:
 - By letter or by phone, for home district office or the capitol office.
 - Confirm appointment by phone or mail.
 - Appointments with legislative aides are also valuable.
- 3** Brief yourself about your legislator:
 - General boundaries of the district.
 - Committee assignments, seniority, etc.
 - Number of terms served.
 - Professional background.
 - Voting record on issues of your interest; major bills introduced.
 - Views stated publicly on issues of your interest.
 - Personal interests of the legislator, i.e. hobbies
 - View the legislator's website
- 4** Define the objectives and your **ASK** prior to your visit:
 - Is your objective to get acquainted, express general views, or discuss specific issues?
 - Limit the number of issues to be discussed.
 - Brief yourself on the facts surrounding the legislation and the applicable bill numbers.
 - Briefly outline your comments and/or prepare written summary.

Before your visit: (continued)**5**

Anticipate:

- Appointment may start late.
- Legislator may be in session and unavailable - Plan to either wait, meet with staff, make new appointment, meet legislator at place of meeting.
- Lengths of meeting may range from 10-15 minutes to an hour.
- Going as a group has advantages, especially if representing a broad base of people and organizations.
- Who (if a group) will be spokesperson, introduce group, guide conversation, provide summary of issue of concern, etc. Assign specific roles to each participant.

While you are there:**1**

Introduce yourself, giving brief information on:

- Location of community.
- How long community has been there; how many employees and residents.
- Affiliation or sponsor.
- Group you are representing.
- Your experience and expertise relevant to the issue for discussion.

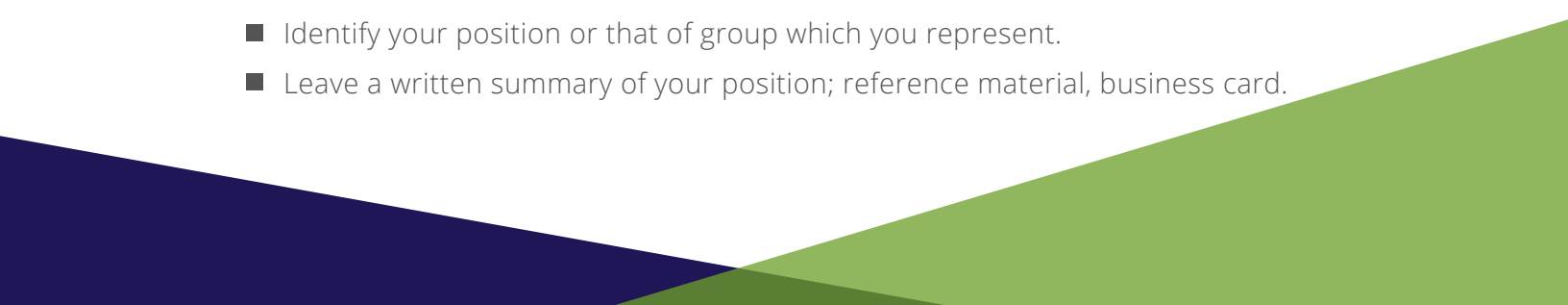
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Set climate of visit:

- Be on time.
- Be positive and friendly – not argumentative.
- Acknowledge areas of agreement.
- Acknowledge areas of appreciation.

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State reason for visit:

- Be concise and specific.
 - State position and recommendation on issue.
 - Identify your position or that of group which you represent.
 - Leave a written summary of your position; reference material, business card.
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While you are there: (continued)**4**

During the conversation:

- Meet and write down names of staff person assigned your issue of concern.
- Don't let questions or comments derail your purpose.
- Admit you need to think more about a new point raised; ask if they will consider written response later.
- Ask specific questions; request specific responses.
- Explore options of attending committee meetings or hearings, visiting galleries, etc.
- Answer any questions asked of you, but if you don't know the answer—don't bluff.
- Be prepared to articulate to any stakeholders who might be in opposition to your issue.

After your visit:**1**

Debrief:

- Talk with members of the group or another person about the experience.
- Determine possible next steps.
- Inform others about what was learned.

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Write a letter:

- Thank legislator for visit.
 - Summarize the visit, comment on what was said by all parties present.
 - Identify follow-up steps committed by legislator and self.
 - Respond to points unaddressed in visit.
 - Reiterate issue, position, and recommendations.
 - Express intention to continue dialogue.
 - Itemize names, addresses, phone numbers, etc. of all participants in visit.
 - Send a copy of your letter to LeadingAge Michigan.
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SAMPLE QUESTIONS

- 1** By 2060, the population of adults aged 65 and over will almost double, from 49.2 million to 94.7 million, and the number of adults over 85 will nearly triple over the same time period, from 6.4 million to 19 million. If elected will you support legislation to provide consumer choice providing long-term care options to persons who cannot afford to pay privately in our community?
- 2** If elected will you support the expansion for safe affordable housing and home and community based services when Michigan consumers can no longer take care of their personal residence?
- 3** According to PHI by 2028, the long-term care sector will need to fill 8.2 million job openings in direct care, including 1.3 million new jobs to meet rising demand and 6.9 million openings caused by workers who transfer to other occupations or exit the labor force altogether. If elected will you work with Not for Profit providers of aging services to avoid this workforce crisis?



MAKING YOUR LETTERS COUNT

You represent a sizable group of your legislators' constituents – the residents and staff of your community. Their views are of major interest to legislators.

Legislators cannot possibly be experts on every issue that requires their consideration and vote. Elected officials rely on you and your willingness to let them know your views. They need to know why an issue is important to their constituents -- you, the voters -- and what impact it will have on the people they represent. Letter writing is the most common way you have to communicate with your legislators.

Why Write

You have something to say, an opinion to offer, a story to tell, a request to make, a question to ask. Always remember that words have power and letters influence. Frequently, public correspondence is light on an issue, thus making your letter very significant. When correspondence is heavy, yours may be very important to offset the volume of letters with a different opinion. Elected officials consider constituent communications to be more influential than the media, government information sources, lobbyists, and many other forms of communication. YOUR stories and requests change both attitudes and votes, and provide courage to the elected official that they are making the proper vote.

Where to Write

When writing to a Federal legislator consider the fact your letter may get more notice at the district office. At the state level, write your state senator and/or representative at their office.

When to Write

Always consider writing early in the session to raise the need for responding to a concern and remember consistent messages to address specific legislation and the issues being debated. Once legislation is being considered in committee or on the floor, your letters must be sent often enough to be known and respected. Always remember if others should be encouraged to write to increase the chorus of voices on an issue. No one wants to be seen as a pest.

What to Say

Everyone wants to see his or her name spelled correctly. Please be sure to review the included table to review the appropriate way to address an elected official. Try to avoid form letters, use your official letterhead when possible, be succinct, positive, and avoid criticism. Always stay on point, share related personal experiences, don't be afraid to ask for their vote, and in the closing paragraph summarize and restate your **ASK**.

HOW TO ADDRESS A PUBLIC OFFICIAL

Office	Official Title	Written Salutation	Spoken
President of the United States	The President	Mr. /Madam President	Mr./Madam President
Vice-President	The Vice President	Mr./Madam Vice-President	Mr./Madam Vice-President
Cabinet Members	The Honorable	Mr./Madam Secretary	Mr./Madam Secretary
U.S. or State Senator	The Honorable	Senator	Senator
State Representative or, Federal	The Honorable	Representative Congressman/woman	Representative Congressman/woman
Speaker of the House	The Honorable	Mr./Madam Speaker	Mr./Madam Speaker
Governor	The Honorable	Governor	Governor
Lt. Governor	The Honorable	Lt. Governor	Governor
Attorney General	The Honorable	Attorney General	Attorney General
Auditor General	The Honorable	Auditor General	Mr./Madam Auditor General
State Treasurer	The Honorable	Mr./Madam Treasurer	Mr./Madam Treasurer

*The correct salutation of all written correspondence begins with the word Dear

Postcards, Petitions and E-mail

Connecting with your legislator is easy! Visit www.LeadingAgeMi.org and click the **Contact Your Legislator** link. From there, select the Michigan Senate, Michigan House of Representatives, U.S. Senate, or U.S. House of Representatives. Enter your address to identify your legislator and access their website, where you can follow the instructions to send a message directly to their office.

What Happens to Your Letter

A member of the legislator's team will quickly read each constituent letter to identify the issue and viewpoint, then forward it to appropriate staff. Legislative staff will then assess the content of mail, the persuasiveness of points made, the volume of opinion, and summarize the information.

The legislator/member of Congress receives quotable phrases, stories, and statistics from these letters for use in meetings, speeches, and hearings. One of two replies will be created: you may receive a standard form letter or a personalized response.

If the response is vague, evasive, or misunderstands your message, write back. Ask follow-up questions and provide additional information. Find out which staff person works on your issue and address that person directly. Always remember to draft a THANK-YOU letter when you appreciate action. And, LeadingAge Michigan appreciates receiving copies of your letters and their responses.

THE DO'S AND DON'TS OF LETTER WRITING:

- DO** Know the correct name (and spelling) of your senator and representative, and address all correspondence to them properly.
 - DO** Write about only one issue in each letter; be brief (one page if possible) and to the point. If you are writing about a particular bill, specify the bill number, if possible.
 - DO** Identify yourself.
 - DO** Include personal examples of how the specific issue you are writing about will affect you and others in the legislator's district.
 - DO** Be courteous and reasonable. Offer to be a resource for further information.
 - DO** Subtly remind your legislator how many voters your facility represents -- how many residents, employees, and volunteers.
 - DO** Be specific about what you want your legislator to do.
 - DO** Write a thank you note when your legislator acts in support of your position.
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And...

- DON'T** Apologize for taking his/her time.
 - DON'T** Be rude or threatening.
 - DON'T** Give up the first time; it may take several sessions to get the legislation you want passed.
 - DON'T** Gloat over success and take defeat gracefully.
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Today's opponent may be tomorrow's friend!

CREATE AN ADVOCATE

You are a leader in your community and your community cares about the seniors you take care of everyday.

Give consideration to involving other key community leaders in your advocacy and share with them your role in caring for the seniors in your community. Do so by trying to identify other key community leaders, regularly inform them about what is going on, forward action alerts and other information. When possible use technology to keep yourselves connected and forward along relevant newsletters, actions alerts, and other information we share with you. Think about a few talking points of advocacy prior to other local networking events like local Rotary or the Chamber of Commerce.

The media can play a part in educating the public, including legislators. Write to the editor of your local paper, reminding the community about the importance of long-term care for our seniors. Schedule a meeting with your local newspaper's editorial board and educate them on your role in caring for seniors in your community; use social media to continue to spread this message. And, above all, seek out new participants for our day of advocacy at the Capitol.

In closing, national studies show that 86% of Americans feel the government must make a bigger investment in services and care for seniors and nearly one in five Americans say the President and Congress should be focused on improving care and services for seniors. Meanwhile here at how we need you to become a grassroots advocate for change.

If you have any questions please feel free to contact **Dalton Herbel** at [**Dalton@LeadingAgeMi.org**](mailto:Dalton@LeadingAgeMi.org)

Thank you!

