



# EDUCATING POLICYMAKERS: A GUIDE TO LEGISLATIVE VISITS and HOSTING SITE VISITS

The California School Health Centers Association has found that building relationships with state and local leaders is vital to the sustainability and expansion of school health centers. Educating legislators about school health centers - what they do and who they serve - is the first step. A legislative visit is an effective way to begin a conversation with your legislator. It provides the opportunity to establish a working relationship and puts a face on the issue. Communicating with your legislators on a continual basis will keep them aware of your needs, highlight your successes, and help ensure the sustainability of school health centers.

Reaching out to legislators serves many purposes. It helps your elected representative more clearly understand the concerns of your organization and the population it serves. It allows you to demonstrate the social contributions the school health center makes to your community by showcasing the services you provide and the people you employ and serve. It also allows you to explain how a proposed new law or regulation would impact students and your health center.

There are two main methods for having fact-to-face meetings with legislators. One is a *legislative visit*, where a few representatives from the school health center visit the legislator's district or Sacramento office for a meeting. The other is a *site visit*, where you invite the legislator and staff to tour your school health center to see it in action. Also, if your school health center is hosting an event, consider inviting your legislator. Regardless of the form the visit takes, it is part of building an ongoing relationship.

The following information is meant to serve as a guide to assist you in scheduling, planning, and conducting a legislative visit or a site visit. Great emphasis is placed in preparing and delivering a cohesive and clear message. Samples of the types of materials you will need are provided on our website at [www.schoolhealthcenters.org](http://www.schoolhealthcenters.org).

The steps outlined here are suggestions - not all elements are necessary for a successful visit - and are in no way intended to make the task daunting. If you have any questions or need assistance, don't hesitate to contact us at 510-268-1260 or [info@schoolhealthcenters.org](mailto:info@schoolhealthcenters.org).

## FOUR EASY STEPS to LEGISLATIVE VISITS

### Step 1: Set up the meeting

Determine who to contact. The California State Assembly is comprised of 80 districts and the state Senate has 40 districts. You can determine your legislators by visiting the California Legislature's website at [www.leginfo.ca.gov/yourleg.html](http://www.leginfo.ca.gov/yourleg.html) and enter the zip code of your health center. You will be directed to all the names and contact information for the state legislators in your district.

Call your legislators' nearest local office. While in session, legislators are usually at their Capitol office Monday through Thursday and in their district offices on Fridays. It's usually more convenient for you to visit the legislator's district office nearest you, but if you prefer, you can visit their Sacramento office. For a schedule of the session, go to [www.legislature.ca.gov](http://www.legislature.ca.gov) and click on "Calendar and Schedules" in the left column.

When you call:

- ◆ Identify yourself and briefly describe your health center/program.
- ◆ Explain why you want to visit and ask to set up a time to come in to speak with the legislator either in the district or Capitol office.
- ◆ If the legislator is unavailable, meeting with staff members is also a great opportunity as they play important roles in shaping priorities. More than likely you will meet with the staff person who covers health and/or education issues.
- ◆ If meeting with the Senator or Assemblymember, you may be asked to send a written request for the visit.

Send a written request, if necessary. Many offices will request a letter. The letter needs to include who will be part of the visit - names and affiliations - and a short description of why you want to meet with the legislator. Due to space constraints, the maximum number of people who can participate in a visit is usually four. If possible, it's a good idea to include a parent and/or youth who can tell compelling personal stories about how the clinic helped them.

Address your letter to "The Honorable [legislator's name]"; for example, Senator Mark Leno would be "The Honorable Mark Leno."

## Step 2: Get Ready

The most important thing to do is to prepare your message. All planning for a legislative visit must be firmly rooted in a *clear and concise message*. Clearly identify a problem and purpose for visiting. It could simply be a meeting to get to know one another. You don't have to wait until there is a pressing issue, and a visit doesn't have to be just about lobbying.

It is critical to develop a uniform message that transcends any single site message so your legislator walks away with a greater understanding about local or state school health center needs rather than a specific opinion about one health center or program director. CSHC has developed the following message and talking points that all school health centers are encouraged to use in conjunction with CSHC fact sheets:

### The California School Health Center message:

School health centers are on the front lines of the health care crisis, doing our best to address the unmet needs of the kids who have fallen through the cracks of California's health care system. We're in danger of falling through the cracks, too. Please don't let that happen.

1. There are 153 school health centers in California.
2. School health centers help keep children out of higher cost health care services.
3. School health centers are a key support for the family.
4. School health centers keep kids healthy and in school.
5. Parent and student acceptance of California's school health centers is high.

Your message should define your work; explain why it is essential; and describe how policymakers can help. Points to include:

- ◆ Examples through personal stories and experiences.
- ◆ Your center's mission and the programs and services your agency provides.
- ◆ The importance and impact of your work.
- ◆ California needs a system to financially support school health centers, such as:
  - Ensuring school health centers are reimbursed for services they provide.
  - Funding the school health center grant program established when the Governor signed SB 564 in September 2008.



**Materials.** Prepare a one-page fact sheet about your school health center, highlighting the message you want the legislator to understand. If needed, CSHC can help you develop a fact sheet that includes a list of services offered, hours, staff, etc. It is also important to provide a statewide perspective on school health centers, which is described in CSHC's materials: a four-page color brochure; CA school health centers overview fact sheet; and Gov. Schwarzenegger's White Paper on School Health Centers. These materials are online at [www.schoolhealthcenters.org](http://www.schoolhealthcenters.org). To obtain additional copies, contact CSHC's Communications Director, Dara Tom, at 510-808-4079 or [dtom@schoolhealthcenters.org](mailto:dtom@schoolhealthcenters.org).

**Strategize cooperatively.** Take the time before the visit to formulate a strategy and get together with everyone attending the meeting.

- ◆ Decide who will make what points.
- ◆ Have facts lined up prior to the meeting.
- ◆ Keep focused on the issue of funding. Be prepared to discuss funding sources, specific funding challenges, and possible solutions.

If yours is one of multiple clinics in a legislator's district, work cooperatively with your colleagues. If possible, invite key staff from all the clinics to participate in a meeting with the legislator (or at the end of the tour, if doing a site visit).

**Materials to give your legislator:**

- ✓ A one-page fact sheet about your school health center.
- ✓ A brochure about your school health center (if available)
- ✓ CSHC's four-page color brochure that gives a general definition and description of school health centers.
- ✓ CSHC School Health Centers Overview Fact Sheet
- ✓ Governor's White Paper on School Health Centers
- ✓ Position paper and/or fact sheet on particular legislation/issue you may be advocating for.
- ✓ Your business card

## Step 3: During the visit

Be punctual and friendly. Legislators and staff are just as busy as you, so be sure to arrive on time for your visit. Greet the legislator and/or staff representative with a firm handshake and thank them for their time. Introduce yourself by giving your name and the name and location of the health center you are representing. Hand your business card to each of the people with whom you are meeting.

Deliver your message. All written materials, briefs, and school health center representatives must be prepared in advance to “be on message” with the central theme of the day to ensure the focus stays where it is most needed. Stay positive and suggest solutions. Encourage your legislator to work with people in your community and your organization to find a solution.

Ask for a commitment. Ask the legislator directly about his or her willingness to work to establish reliable and adequate sources of ongoing support for school health centers. Identify points for follow-up and invite the legislator and staff to visit the school health center (see information below on “Hosting a Site Visit”).

What happens when issues are raised that you did not expect? Answer directly if you know the topic. If you don’t know, it’s OK to tell them so and offer to get back to them with the information.

### Tips for communicating with the legislator:

- ❑ Know your legislator. Review his/her biography (available on the web.) Learn their party affiliation, committee and subcommittee membership and past record on the issue you will be discussing. Knowing these facts will help guide your discussion and demonstrate that you have adequately prepared for the visit.
- ❑ Remember: You’re the expert! Legislators and staff usually know little or nothing about our issues. Be sure to explain all acronyms, programs, funding sources and which agencies administer the funds.
- ❑ Be Political: Put a community face on the issue. Legislators want to represent the best interests of their district or state. Wherever possible, demonstrate the connection between what you are requesting and the interests of the legislator’s constituency. This is one reason it is valuable to include the perspectives of youth, parents and families.



## Step 4: Follow-up

This should not be a one-time event. It is important to incorporate visits with local officials, business leaders, and community leaders as part of a regular routine. School health center advocates can begin to get comfortable with visiting “dignitaries,” and you will learn how to feel less anxious or nervous about such visits.

The important element in visits with legislators is establishing a connection that will continue in the future. In order to maximize effectiveness, there should be a plan as to how this visit fits into a more extensive advocacy agenda. When your legislator is called upon to show leadership for the health of children and youth, he/she may draw upon their knowledge and impressions gleaned during their visit with you and other school health center advocates.

Immediately after the visit. Follow up with a thank you letter outlining the points covered during the meeting, and include any additional information, if it was requested.

Report back to CSHC. CSHC is continually prioritizing and strategizing which legislators to visit. By letting us know that you’ve made a visit, we can better plan our lobbying efforts. Please complete our legislative visit feedback form (available at the end of this document) and fax it to CSHC’s Central Valley Policy and Field Coordinator, Salina Mendoza, at 510-268-1318 or e-mail to [smendoza@schoolhealthcenters.org](mailto:smendoza@schoolhealthcenters.org).

On-going efforts. Send reports and newspaper articles relevant to school health centers in California and elsewhere. When CSHC is in support of or opposed to specific legislation: Ask others - parents, youth, school principals, PTA and school board members, community, religious and business leaders, friends, neighbors - to write letters to the legislator that support our position.

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## HOSTING A SITE VISIT

One of the most effective ways of educating legislators about the principles and programs of school health centers and the need for their continued support is to invite them to visit your health center. A site visit gives a legislator and his/her staff the opportunity to see firsthand some of the services that children and youth receive when they use your health center. Additionally, site visits provide legislators with the chance to experience the dedication and enthusiasm of ordinary citizens who are making a difference in the lives of children, youth and families. And they will learn about programs that keep children and youth healthy and in school!

The legislator may be interested in learning more about the critical role of the school health center, how the community agreements work, how the site administrators deal with the various funding entities and collaborative partners, and how the corporate and business community can be involved. Being able to speak directly with providers, students, school administrators, partnership staff, parents and residents is tremendously helpful to state lawmakers.

### Site selection

Choose a site where you can comfortably accommodate visitors: a conference room, office or lunchroom where people can meet first and wrap up after the tour. Ideally, there will be space for people who are part of the visit (including parents and staff) to engage in a conversation with the legislator as he/she takes the tour; and the site should demonstrate the range of medical services.

Plan what programs or services to highlight, with whom the legislator will meet and other details. Don't think the tour will come together on its own. Have a plan for what you want the legislator to see and hear. Legislators have reported that conversations with youth have strongly influenced their legislative work and advocacy on behalf of youth programs.

Send a written invitation. Follow the same protocol as mentioned in Step One. Write a letter to your legislator inviting him/her to visit. Briefly describe your center, its programs, and indicate who will participate in the visit.

**IDEA!** Give a specific focus for the visit. Plan the visit to maximize attendance and attention. One idea is to send a letter from the students served by the school health center inviting legislators to share mid-morning coffee/recess with a student representative, school administrator, parent and staff. Legislators are likely to stay longer if they wish, but keep the official invitation to 60 minutes.



Invite local news media. A site visit with a legislator is a terrific opportunity to get news media coverage. Submit a news release to local education and health reporters that connects the work of school health centers with the need for California to develop a system to financially support them. Remember to inform the elected official's office that the news media has been invited. If you would like assistance with news media outreach, see our Tools Section at [www.schoolhealthcenters.org/newsoutreach](http://www.schoolhealthcenters.org/newsoutreach). You can also contact CSHC's Communications Director, Dara Tom, at 510-808-4079 or [dtom@schoolhealthcenters.org](mailto:dtom@schoolhealthcenters.org).

### Site visit

It is important to structure the visit. Don't plan a big presentation or focus a lot of time on talking. Instead, give a brief introduction and then give visitors an opportunity to ask questions throughout the visit. Note: Visitors are likely to ask questions when they arrive and when they leave. A typical visit lasts about 60 minutes.

#### At the start (before the tour):

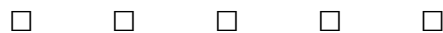
- Invite visitors to sit down while you prep them for the clinic visit.
- Give the legislator and/or staff person your business card (or a list of all participants and their titles).
- Present supporting materials you have prepared.
- Give a brief overview of the background of the school health center, its personnel, the children and parents served, and services provided.

#### During the tour:

- As you tour the clinic, describe funding sources, with special emphasis on the chronic challenge of keeping the doors open.
- Draw from the arguments and evidence presented in CSHC's four-page brochure to support your description of the effectiveness of school health centers.
- Consider telling one or two brief "success stories." You might want to arrange for a parent and/or teacher to be present for questions.
- Clinic staff not involved with the tour should continue working as usual.

#### Wrapping up:

- Allow for time after the tour to sit down with the legislator to explore possible solutions to budget challenges.
- Thank participants for taking the time to visit and for their past support, if appropriate.
- Follow-up the tour as you would a legislative visit (Step Four).





# LEGISLATIVE MEETING REPORT BACK FORM

California School Health Centers Association

## DATE OF VISIT:

Name(s) of \_\_\_\_\_  
person making \_\_\_\_\_  
visit: \_\_\_\_\_  
\_\_\_\_\_

## VISIT INFORMATION

Name of person you  
met with: \_\_\_\_\_

Title: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Office of:  Senator  
 Assemblymember  
 Congress member

Name: \_\_\_\_\_

## PRIMARY PURPOSE OF VISIT:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Knowledge of school health ctrs:	Zero	Passing knowledge	Familiar	Very Knowledgeable
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Interest:	Unsupportive	Neutral	Supporter	Champion
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Comments/Quotes from the Legislator:

## Questions we need to follow up on:

How well prepared did you feel for your visit?	Very well	Well	Not that well	Not well at all
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## How could we prepare you better next time?