
The Importance of Building Relationships with Your Legislators:

Legislators are called upon to weigh in on a vast number of issues from health care to energy to farm policy...and more. While a legislator may be an expert on one or two issues, it is impossible for him or her to master every issue likely to come before Congress. Elected officials rely on good staff work, outside expertise and, most importantly, constituent input to effectively represent the people of their district or state.

That’s why they need... and want... to hear from you. As a hospital or health system leader, you represent a cornerstone of your local community, and your local economy.

An ongoing dialogue with your elected officials is the best way to ensure they understand how their decisions will impact their constituents back home. No one can better explain the complexities of health care delivery and the impact policy changes in Washington would have on your organization’s ability to continue delivering care than those at the front lines.

We tend to communicate with our legislators only when we want to urge them to take action for or against a certain piece of legislation. But it’s also important to build a relationship with your legislators... to offer your expertise and counsel... so that when a burning issue arises, they look for your opinion and give weight to what you say.

This guide provides tips on how to cultivate a relationship with your legislators and their staff, outlines the key leaders in the House and Senate, and shares tips for communicating more effectively and navigating the complexities of Congress.

An important note: Under federal tax law, 501(c)(3) organizations, like hospitals, can, within permissible limits, engage in lobbying about issues, including communicating with any legislator or legislative staff member, where the principal purpose is to influence legislation. However, there is an absolute prohibition on 501(c)(3) organizations participating or intervening in any political campaign on behalf of or in opposition to candidates for public office.

If you have questions about what is or is not permissible, please consult with your lawyers and/or AHA legal counsel.
Introduce Yourself – Reaching Out to Your Legislators

Scheduling a personal visit – in either the legislator’s district or state office, or the Washington, D.C., office if you will be in town – is an effective way to introduce yourself to your legislators and the key members of their staff with whom you will most frequently interact.

When you contact the office of a representative or senator to request a meeting, you’ll probably speak to his or her Scheduler. Explain who you are, the organization you represent and the purpose of your meeting – to introduce yourself, and your organization, to the legislator. If you know anyone on the legislator’s staff, they may be able to assist you in setting up a meeting.

Also consider asking to schedule meetings with any pertinent staff, such as the Legislative Assistant tasked with tracking health care issues or the Chief of Staff (see “Who’s Who in a Legislator’s Office” at the back of this guide for more on staff roles).

A few tips to make setting up a meeting go smoothly:

• Be flexible on the timing. Remember, legislators are juggling priorities and have busy travel schedules. Many travel frequently between their home office and Washington and may be more available to meet with you in their district or state. Others travel infrequently due to distance or committee responsibilities and may have limited availability to meet outside of designated district work periods. Be as flexible as possible with your time in order to make the most of theirs.

• Explain the purpose of the meeting and how long it will take. If you need 20 minutes, ask for 20 minutes. Don’t ask for more time than you need.

• After you’ve scheduled a meeting, send an e-mail to the scheduler or other relevant staff member confirming the date and time. This reduces scheduling errors and helps make you more visible.

On the day of the meeting, arrive early and come prepared with background materials about your organization – its size, history and role in your community. Bring extra copies for staff, as well as multiple copies of your business card. Also, ask for staff’s business cards, and if they prefer to be contacted by phone or email.

At the meeting, begin by introducing yourself and your organization. This is an opportunity to share your organization’s story. Talk about the services you offer, your employees, your work within the community, and the economic impact you have on the community at large – vendors and other service providers, as well as local businesses. Invite your legislator and his or her staff to tour your organization to learn more about the work you do and meet the people who care for their community.

After the meeting, send a follow-up letter or e-mail thanking the legislator and/or staff for meeting with you and expressing your desire to work together in the months and years to come. This is also a good opportunity to repeat your invitation to tour your hospital. And don’t forget to thank the Scheduler who arranged the visit on your behalf.

Tips for Giving a Tour of Your Hospital

A tour provides the opportunity to familiarize your legislator (or his or her staff) with what you do and the challenges you face. The purpose of the tour should be informative, not political. Hospitals cannot employ resources to influence voter preferences or the outcome of an election. Please see the “Legal Do’s and Don’ts” at www.aha.org if you have questions about what exactly is or is not permissible, or consult with your lawyers and/or AHA legal counsel.

Be patient with the scheduling. It may take some time to fulfill a time-intensive and not time-sensitive request like a tour; but also be persistent so they understand this is important and you won’t simply “go away.” Once a date has been set, you’re ready to plan a successful and productive visit. Here’s a list of things you may want to keep in mind:

• Prepare a factsheet about your hospital. Include important information such as services provided, number of personnel, other locations, services within the community, awards, information about key people and interesting facts. This will give
your legislator and his or her staff a quick and easy look at your organization and the role it plays in your community.

- **Arrange for a photographer** if you want photos of the visit for your internal communications.
- **Determine if press will be allowed into your facility.** Check with the legislator’s office to see if they plan to notify the press of the visit. If you don’t want the press involved, then tell your legislator that press is not allowed. If you agree to allow the press in, make sure your legislator’s office understands this tour is an opportunity to learn more about your organization and not a campaign opportunity. Assign a staffer to work with the press and determine in advance what parts of the visit are off-limits. Also, make sure all proper procedures are followed to maintain patient privacy.
- **Notify your staff of the tour’s date and time.** Make sure your employees are aware of the legislator’s visit and the purpose for the visit – getting to know your organization, the great work you do in your community and the challenges you face as you go about this work. Emphasize that this is not a political or campaign visit but a chance for your organization to spotlight the great work they do every day.

- **Set aside a place for your guests to make a phone call, check their e-mail or relax for five minutes before the tour begins.** An uncluttered office or conference room will suffice.
- **Set aside time for discussion.** Either at the end or the beginning of the tour, set aside some time for you and possibly other key people to sit down with your guests to discuss any burning issues and go over any questions they might have.
- **Send follow-up letters.** Send a letter thanking the legislator for making the visit, and use the opportunity to reinforce the points you made during the tour. If a key staff person who has oversight of your issues participated in the tour, a separate follow-up note to that person also is a good idea.

**A Note about Timing.** Legislators are eager to interact with their constituents during congressional recesses. Recesses generally occur the weeks before or after a major federal holiday and in the month of August. Check www.congress.gov for the latest congressional calendars. A standing invitation to tour your facility during the month of August or other major congressional recesses would increase the likelihood of the legislator accepting the invitation.

### Nurturing the Relationship

**A strong relationship needs to be nurtured and maintaining a dialogue is essential.** Now that you’ve met your legislator and key members of his or her staff, continue to reach out to them on a regular basis on both urgent issues and matters of policy. Remember, legislators and their staff are not experts on every issue. They rely on input from constituents to inform their opinions on legislation and policy. You want them to consider you a valuable resource.

Nearly every minute of a legislator’s day is scheduled from breakfast briefings to morning committee meetings to afternoon votes to evening fundraisers. Consequently, it is difficult to reach your legislators and their staff by phone. Also, due to the anthrax scare of 2001, all congressional mail is sent to a facility separate from Capitol Hill and irradiated to kill possible toxins. That slows down delivery to a glacial pace. Dispatching your letter via Fed Ex or UPS will not help since your package will be intercepted by the Congressional Post Office and sent out for irradiation as well. E-mail is typically the preferred form of communication but be sure to ask your legislators and their staff how they like to communicate.

The keys to writing an effective e-mail are simple:

- **Personalize the message as much as possible.** Remind the legislator or staff member you are addressing of your most recent meeting or interaction. Personalization may mean your message is given closer attention.
• **Get to the point.** Remember, each staffer is dealing with a large volume of e-mail. Try to confine yourself, if possible, to no more than one or two issues. Explain your position as clearly as possible. If the issue is complicated, attach additional material; if the reader wants more information, he or she can read the attachments. Also, include your telephone number so he can call you if you have piqued his interest.

• **Share your personal experience.** Use real-life examples to illustrate your points.

• **Limit any formatting.** It is important then to keep the format of the e-mail as simple as possible since most are read on mobile devices. Do not include extraneous graphics or signatures.

**A Note about Social Media.** Nearly all members of Congress have social media accounts such as Facebook and Twitter. You can connect with Congress online to see what issues are most important to them and share your views. Conversations about what is happening in your community are happening online and social media tools give you an opportunity to participate in the dialogue to make sure your voice is heard.

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**Reaching Out by Phone**

From time to time you may need to reach out by phone if a matter is urgent. Here are a few tips:

• **Get straight to the point.** Explain who you are and why you are calling.

• **Do your homework.** Make sure you have your facts straight and your talking points ready. You may only have a few minutes to get your point across.

• **Be ready to answer questions.** Don’t expect a one-sided conversation. Anticipate questions your legislator or the staff member could ask you and have answers. If you’re asked a question to which you don’t know the answer, say you don’t know but offer to follow up and then follow through on your promise.

• **Follow up your conversation with an e-mail referencing your conversation.** Reiterate your points and provide any additional information you’d promised.

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**Who’s Who in a Legislator’s Office**

**Commonly used titles and job functions of congressional staff:**

• **Chief of Staff:** The chief of staff, sometimes referred to as the administrative assistant, handles the overall office operations, including the assignment of work and the supervision of staff. He or she reports directly to the senator or representative and usually is responsible for evaluating the political outcomes of various legislative proposals and constituent requests.

• **Legislative Assistant:** In most legislative offices, there are several legislative assistants with responsibilities and expertise in specific legislative areas. For example, depending on the responsibilities and interests of the member, an office may include a different legislative assistant for health issues, environmental matters and taxes.

• **Legislative Correspondent:** The legislative correspondent manages the legislator’s correspondence. He or she reads, logs and tallies letters and e-mail from constituents and flags items for the legislator’s review.

• **Legislative Director:** The legislative director monitors the legislative schedule and makes final recommendations to the legislator regarding particular issues. In some offices, the legislative director supervises the legislative assistants.

• **Press Secretary or Communications Director:** The press secretary is responsible for managing the legislator’s relationship with the media and the general public. He or she is expected to know the benefits, demands and special requirements of both print, electronic and social media, and how to most effectively promote the member’s views or positions on specific issues. Many press secretaries double as speechwriters.

• **Scheduler, Appointments Secretary:** The scheduler is usually responsible for allocating
a legislator’s time among the many demands that arise from congressional responsibilities, staff requirements, politics and constituent requests. The appointments secretary also may be responsible for making necessary travel arrangements, arranging speaking dates, visits to the district, etc.

- **Executive Secretary/Assistant**: Executive secretaries or executive assistants often handle scheduling responsibilities as well as the day-to-day management of a legislator’s office.

**A Note about District Staff.** A legislator also maintains staff in his or her district or state office. It is a good idea to take the time to get to know these individuals as well, given that they may be more familiar with your organization and its role in the local community. The **District Staff Director** is the legislator’s main point person in the district when he or she is in Washington, D.C. The District Staff Director reports directly to the legislator about the local community and can help move along meeting requests and other information you may wish to convey to the legislator. A **Caseworker** is a staff member assigned to help with constituent requests by preparing replies for the member’s signature. The Caseworker’s responsibilities also may include helping resolve problems constituents present in relation to federal agencies, e.g., Social Security and Medicare issues, veteran’s benefits, passports, etc.

### Glossary of Legislative Terms

**Commonly used legislative terms and their definitions:**

- **Act**: A bill after it has passed either the House or Senate or been enacted into law.

- **Amendment**: A proposed change in a bill or motion, either in committee or on the floor of the legislative chamber. The Constitution also can be changed through passage of an amendment.

- **Authorization**: A bill that creates a program and sets the amount of funding that the program should receive. The authorization to actually draw funds from the federal treasury and the amounts to be drawn are established by an appropriation.

- **Bill**: A proposed law.

- **Budget Authority**: Allows the federal government to incur a financial liability, typically a contract for direct payment, a loan or a loan guarantee.

- **Calendar of Bills**: A calendar of bills, or legislative calendar, is a daily work sheet of those measures reported from committees and ready for consideration by the Senate or House.

- **Caucus**: A caucus is a meeting of the members of a political party in the U.S. Congress in which party policy on proposed legislation is discussed and refined. Caucus also can be used to define the collective members of one political party in the legislature, as in “the Democratic Caucus.”

- **Conferees**: Senators and representatives appointed to serve on the conference committee (see below).

- **Conference Committee**: The House and Senate appoint conferees to a conference committee to resolve differences between House- and Senate-passed versions of the same or similar bills.

- **Congress**: The United States legislative branch of government, consisting of the Senate and the House of Representatives. There are 100 Senators and 435 Representatives.

- **Continuing Resolution**: Legislation in the form of a joint resolution enacted by Congress, when the new fiscal year is about to begin or has begun, to provide budget authority for federal agencies and programs to continue in operation until the regular appropriations acts are enacted.

- **Co-sponsor**: One of a group of senators or representatives who introduces a bill for consideration. 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-sponsorship increases a bill’s chances for consideration.

- **Cloture**: The only procedure by which the Senate can vote to place a time limit on consideration of a bill or other matter, and thereby overcome a filibuster.

- **Federal Appropriation**: A formal approval to draw funds from the federal treasury for specific purposes.

- **Federal Budget**: The president’s annual proposal to Congress, usually submitted in February, for federal expenditures and revenues for the coming fiscal year (which starts October 1).

- **Federal 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.

- **Federal 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. Witnesses present testimony and answer questions.

- **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**: Following 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 “mark-up.” Often the chairman of a 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.

- **Omnibus Bill**: A single legislative document containing many laws or amendments.

- **Point of Order**: An objection by a legislator 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.

- **President Pro-Tem**: Although no one outside the Senate refers to the Vice President in this manner, he or she is the President of the Senate. The Constitution provides for a “president pro tempore” to perform the duties of senate president in the event of the president’s absence. This office is filled by the majority party in the Senate.

- **Report**: A printed record of a committee’s actions and views on a particular bill or matter. Reports are important because they are used as guidelines in promulgating federal regulations that implement or enforce the bill if it becomes law.

- **Resolution**: A resolution is a piece of legislation used to make declarations, state policies or announce decisions. Resolutions express the sentiment of the Congress but usually require no direct action by the federal government. For example, a “resolution” could be passed to commend the actions of some brave firefighters, but it would take a “bill” to award those firefighters a medal or monetary reward for their efforts.

- **Select Committee**: A select committee is established by the Senate or the House for a special purpose and for a limited time. When the select committee’s function has been carried out and a report made, it is automatically dissolved.

- **Speaker of the House**: The presiding officer of the House of Representatives is the Speaker of the
House. The Senate does not have a Speaker; that role is filled by the Majority Leader.

- **Standing Committees:** Standing committees, as permanent units of the House and Senate, serve as the workshops of the legislature. It is their duty to carefully study all bills referred to them, reject some bills and to prepare others to be reported with a favorable recommendation from the committee.

- **Unanimous Consent:** A senator may request unanimous consent on the floor to set aside a specified rule of procedure so as to expedite proceedings. If no senator objects, the Senate permits the action, but if any one senator objects, the request is rejected. Unanimous consent requests with only immediate effects are routinely granted, but ones affecting the floor schedule, the conditions of considering a bill or other business, or the rights of other senators, are normally not offered, or a floor leader will object to it, until all senators concerned have had an opportunity to inform the leaders that they find it acceptable.

- **Whip:** Senator or representative who serves as an internal lobbyist for the Republican or Democratic party, persuading legislators to support the party position and counting votes for the leadership in advance of floor action.
Republican House Leadership

Speaker of the House:
Paul Ryan (R-WI)
1233 Longworth House Office Building
Washington, DC 20515
Phone: (202) 225-3031
https://paulryan.house.gov/

Majority Leader:
Kevin McCarthy (R-CA)
2421 Rayburn House Office Building
Washington, DC 20515
Phone: (202) 225-2915
https://kevinmccarthy.house.gov/

Majority Whip:
Steve Scalise (R-LA)
2338 Rayburn House Office Building
Washington, DC 20515
Phone: (202) 225-3015
http://scalise.house.gov/

Conference Chair:
Cathy McMorris Rodgers (R-WA)
203 Cannon House Office Building
Washington, DC 20515
Phone: (202) 225-2006
https://mcmorris.house.gov/

Democratic House Leadership

Minority Leader:
Nancy Pelosi (D-CA)
233 Cannon House Office Building
Washington, DC 20515
Phone: (202) 225-4965
https://pelosi.house.gov/

Minority Whip:
Steny Hoyer (D-MD)
1705 Longworth House Office Building
Washington, DC 20515
Phone: (202) 225-4131
https://hoyer.house.gov/

Assistant Minority Leader:
Jim Clyburn (D-SC)
242 Cannon House Office Building
Washington, DC 20515
Phone: (202) 225-3315
https://clyburn.house.gov/

Caucus Chair:
Joe Crowley (D-NY)
1035 Longworth House Office Building
Washington, DC 20515
Phone: (202) 225-3965
http://crowley.house.gov/
Key Leaders in Congress

Senate Leadership

Republican Senate Leadership

Majority Leader:
Mitch McConnell (R-KY)
317 Russell Senate Office Building
Washington, DC 20510
Phone: (202) 224-2541
http://www.mcconnell.senate.gov/

Whip:
John Cornyn (R-TX)
517 Hart Senate Office Building
Washington, DC 20510
Phone: (202) 224-2934
https://www.cornyn.senate.gov/

Conference Chairman:
John Thune (R-SD)
United States Senate SD-511
Washington, DC 20510
Phone: (202) 224-2321
http://www.thune.senate.gov/

Policy Committee Chairman:
John Barrasso (R-WY)
307 Dirksen Senate Office Building
Washington, DC 20510
Phone: (202) 224-6441
http://www.barrasso.senate.gov/

Conference Vice Chairman:
Roy Blunt (R-MO)
260 Russell Senate Office Building
Washington, DC 20510
Phone: (202) 224-5721
http://www.blunt.senate.gov/

Democratic Senate Leadership

Leader & Chair of the Conference:
Charles Schumer (D-NY)
322 Hart Senate Office Building
Washington, DC 20510
Phone: (202) 224-6542
https://www.schumer.senate.gov/

Whip:
Dick Durbin (D-IL)
711 Hart Senate Building
Washington, DC 20510
Phone: (202) 224-2152
http://www.durbin.senate.gov/

Assistant Leader:
Patty Murray (D-WA)
154 Russell Senate Office Building
Washington, DC 20510
Phone: (202) 224-2621
http://www.murray.senate.gov/

Chair of the Policy and Communications Committee:
Debbie Stabenow (D-MI)
731 Hart Senate Office Building
Washington, DC 20510-2204
Phone: (202) 224-4822
http://www.stabenow.senate.gov/

Chair of Steering Committee:
Amy Klobuchar (D-MN)
302 Hart Senate Office Building
Washington, DC 20510
Phone: (202) 224-3244
http://www.klobuchar.senate.gov/

Chair of Outreach:
Bernie Sanders (I-VT)
332 Dirksen Building
Washington, DC 20510
Phone: (202) 224-5141
http://www.sanders.senate.gov/