



## Oregon Academy of Family Physicians - 2024

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### Quicksteps - How to Plan a Clinic Visit

- Scheduling: here's how to figure out where to call/email
  - Link to help you find your legislator:  
<https://geo.maps.arcgis.com/apps/instant/lookup/index.html?appid=fd070b56c975456ea2a25f7e3f4289d1>
  - Health Care Committees
    - [Senate](#)
    - [House](#)
  - [Oregon State Legislature](#)
    - This website will have most of the information you need including the information linked above.
- How much time to block
  - We advise at least an hour to ensure there is time to tour your facilities and have a facilitated discussion
- Who at the clinic to involve
  - Practice manager
  - Medical director or other clinician
  - Care coordinator/CHWs
  - Patient stories are a valuable resource to use

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- How to make your case
  - What you need to be able to say off the top of your head
    - Have clear asks for the elected officials ex. specific policy or funding request
    - Share your successes
    - Share your challenges (if there is a way for them to help)
  - What written materials you'll need (we'll help!)
- Getting the most out of the visit
  - Thank you, following up, and keeping in touch

## Getting Started

- First, **appoint someone to take charge of the visit and be the primary point of contact** with the legislator's office. Depending on what you're hoping to show them, a planning committee might be helpful.
- Think about whether you want to try to engage patients (this is a great idea, if you can do it) Can you get a patient or two to be there?
  - If not, having a graphic that includes patient stories can be a great resource
- What type of meeting do you want to host?
  - **Coffee** - If you do not have a place to host, you can suggest a coffee meeting. In-person meetings are generally more favorable than virtual.
  - **Lunch** - If you have space to host them, this is a good idea. It's good focused time to talk with them.
  - **Facility Tour** - ideal if you have a new facility or program you would like to highlight
- **Assign someone to coordinate logistics**, such as reserving a meeting room, planning any meals or refreshments or making parking arrangements.
- **Know the purpose of the visit.** We are focused on building relationships with legislators who don't know much, if anything about primary care. This is your chance to tell them about what is wonderful about your clinic and the work you do, AND what is difficult. If you already know your legislator, the visit takes on more of a "check in" tone - which is a great reason to invite them! In either case, the visit provides an opportunity to discuss issues of concern and to establish the clinic as a resource for information on health care topics.
- We suggest you **do some initial research on the legislator.** If you have any connections to them (church? Kids' schools? Hobbies? Mutual friends?), that can

be a helpful bridge to find common ground. We will provide you with some information about the legislator (if they have a voting history, especially on bills that are important to us, we'll share that with you; if they're new or recently appointed to a health care committee, we'll help you be able to cite what's been going on for them, what they're hearing, etc.), but it's a good idea to do some of your own research, too.

## Issuing the Invitation

- **Contact your legislator as soon as possible.** It probably will take a couple of weeks to work a clinic visit into their schedule. If you're scheduling between the end of the election and the beginning of the new legislative session, try for the earliest possible date.
  - If you have open availability, it is better to ask the legislator for their availability and build the event around that
  - If you have limited availability, be sure to identify at least three dates to offer the legislator
- Send the invitation by email.. See template below

Dear [Representative Doe or Senator Doe],

[Clinic name], is a primary care provider in your district and we would like to invite you to visit our clinic. [If you have met them make sure to let them know how they know you - lobby day, community event etc]. We would like the opportunity to show you how we are serving your district and build a deeper understanding of the importance of primary care.

The tour will include [itinerary ex. Welcome from our executive director, followed by a tour of the facility, ending with a round table discussion with refreshments].

Please let me know if any of the below dates and times would work for your schedule. We hope you can join us!

[Include date and time options for at least two dates ex. Monday (xx/xx) from 12:00-2:00 PM or Friday (xx/xx) from 9:00-12:00 PM]

- (Optional) Send a formal letter of invitation from you, the requesting doctor, and/or the Medical Director and chief administrator at the clinic. The invitation should be sent to the district office and also send a copy to the Capitol office.
- Expect that a legislator will likely bring at least one staff member, and get their contact information. Staff members are gatekeepers during legislative session and between; treating them kindly and with respect is always a good idea.

- There is also a chance a legislator will ask to send staff in their place if the legislator has a previous engagement. Meetings with staff can still be deeply valuable.
- Within a couple of days (3-5 days) of sending the invitation, your primary contact should follow up with a telephone call to the legislator's office. It is helpful to have a couple of possible days to suggest, but at a minimum, try to identify the (typically) best day of the week for your clinic. **Try to nail down a date as quickly as possible.**
- Once the visit has been scheduled, send an email to confirm, and note any special arrangements (e.g., where to park, which entrance to use, whether lunch will be served, etc.). It's also a good idea to include an overview of the agenda and a list of who will be involved. Call the office again on the day prior to the visit to confirm that the legislator is still planning to come. Lawmakers' plans can change at the last minute, so be flexible.
- Some legislators may want to receive more detailed information about the visit in advance. You may be asked to provide biographical information on key leaders of the hospital, a copy of your annual report, or other information. Be prompt in sending any requested information.

## Planning the Visit

- Organize the visit so that it includes a brief tour of a clinical space, as well as the administrative spaces, as well as a "sit-down" meeting. Don't worry if you don't have a dedicated meeting space - this can even be in an individual's office with a spare chair borrowed from another space. Use the tour as a backdrop for your discussion of key legislative issues. **Allot about 30 minutes for the tour, and about the same amount of time for the sit-down portion of the visit.** Don't worry if lunch has to be modest - Oregon's rules for what legislators can accept are pretty strict so cheap is fine.
- Provide opportunities for the legislator to meet key staff, including administrative staff and those who work directly with patients. Share informational materials with these individuals so that you can all be on the same page.
- Give yourself and the team a 'practice run' to make sure you have a good plan for how the clinic tour will go.
- **Make sure you communicate to all the clinic staff about the visit.**
- Prepare for questions that the lawmaker may ask.
- Keep the information you share with the legislator brief and clear. We'll give you:
  - A fact sheet about the importance of primary care
  - A fact sheet about family medicine in Oregon
  - A one-page handout with talking points about the key issues we're hoping to get across.

- **Tell Betsy and Iris Maria when you've got the visit scheduled and we'll help with any research or information needed to illustrate your concerns.**
- Make sure to take pictures, and please share them on social media with the hashtags, OAFP will provide these, and tag the legislator if they're on that platform
- On the day of the visit, send a reminder to the staff in the areas to be visited.
- Let the legislator and/or their staff know how to get in touch if they have follow-up questions. If you're comfortable sharing your cell phone number, we recommend it. For a legislator to have a doc on "speed dial" so to speak, when issues come up, is really powerful.

## After the Visit

- Send a hand-written thank-you note, thanking the legislator for their time and briefly restating your willingness to serve as a resource on health care-related issues. The letter should be signed by the same person or people who issued the invitation.
- Couple the physical thank you with an email
- Be sure to **include any follow-up information that was promised.**
- **Send the legislator copies of any photos and/or articles about the visit..** The photos will probably end up in their newsletter.
  - Subscribing to your legislator's newsletter is another great way to stay connected! All legislators have a section on their profile page on the [Oregon State Legislator](#) website that says "e-Subscribe Email updates from Representative John Doe", just enter your email address, hit go, and you are subscribed.
- Evaluate the visit internally, noting both strengths and weaknesses for use in planning future visits.
- Fill out our [OAFP Touchpoints Form](#) to let us know how things went
- **Maintain and build the relationship with the lawmaker.** Keep legislators informed through regular updates about your clinic. Add them to the mailing list for an existing newsletter, or prepare a special mailing – perhaps quarterly – just for them. Offer to assist with background material on health issues, and always respond to information requests promptly.

Sample guides: <https://www.tha.org/blog/show-and-tell-hosting-a-lawmaker-at-your-hospital/>