

HOW TO ORGANIZE FACILITY TOURS FOR PUBLIC OFFICIALS

Planning your tour. . .

Whether you have invited a legislator to tour your facility during a personal meeting or through phone calls and letters, there are some proven techniques for making the most of your tour opportunity. The steps involve planning, conducting, and following up the tour.

When a legislator visits your facility, he or she glimpses first-hand what we offer local communities. Facility tours humanize our issues. They remove legislators from the world of graphs and charts and show them how their policies impact real people. Legislators have the chance to see real people providing quality care to real elders.

A well-planned tour leaves your legislator with a better understanding of you, your employees and your residents. It sows seeds that could be all-important at the moment of a crucial decision – when he or she will vote on policies that directly impact your ability to care for your resident.

When to plan. . .

You should consider inviting not only sitting legislators and other elected officials, but also candidates. You should also reach out to any elected official who shows a desire to learn about what you do. You never know who may be our ally in the Legislature.

Election seasons provide an ideal time for a facility tour. Candidates welcome opportunities to meet with local businesses and shake hands with voters in diverse places. A tour of a long term care facility also provides a desirable setting for photos and even televised coverage on the nightly news. Every politician wants to demonstrate they care about seniors.

Another excellent time to invite legislators to tour your facility is when the Legislature is not in session. You should try to time your request for a facility tour when there are not pressing legislative activities.

The invitation. . .

As in your business and social life, a personal visit generally has more immediate impact and more lasting impression than a letter. Every member of the Legislature has a district office.

District offices are staffed with people whose job it is to communicate with constituents like you. There are no barriers to stopping by these

local offices and establishing relationships with the legislator's staff. The welcome mat is out! Stop by and invite the legislator in person or through their staff.

Some days are better than others to visit with your legislator in the district. Most legislators are back in their home districts during non-legislative times. Why? They want to meet with constituents, consult with their district staff, and keep in touch with local issues and voters.

Build in your Association. . .

Let your FHCA staff know that you are planning a facility tour for your legislator. Your association will provide you with valuable information about the legislator and his or her position and give you tips to make the facility visit a success.

Plan a tour around an event. . .

Occasionally you hold events at your facility that you may never have considered as an opportunity to invite your elected officials. It takes a different way of thinking when you focus on getting involved politically.

You certainly don't have to tie your tour invitation to a special event, but it is a good idea. All of the following special events are potential opportunities for legislators to share the public spotlight at the same time that they visit your facility and listen to your views on legislative issues:

- * Groundbreaking for new or expanded facilities
- * Scholarship presentations
- * Professional award ceremonies
- * Employee of the Year award
- * Launching of local civic or health care initiative
- * Facility open house
- * 100 year old birthday celebration
- * Dedication of new flagpole
- * Inauguration of new services for residents or community

Here's a plan that works. . .

- * To schedule a facility tour, begin by calling or visiting your legislator's office and obtaining several possible dates when he or she is available. Follow the call with a formal letter of invitation. Describe the facility, its operation, and the number of employees and residents.
- * Plan to invite one elected official at a time. This works best in order to get to know the legislator and allow them to spend time with your residents and employees.
- * Set aside an entire morning or afternoon (approximately two hours) for the tour. Breakfast, lunch, or a reception should be included. Notify employees about the tour and provide them with background information on the visitors. You can request campaign pamphlets from the visiting candidates. They will appreciate that their message is being delivered.
- * Include residents and their families in the process so they know you are actively involved on their behalf.
- * Consider sending a press release to local media announcing the tour. Arrange for a good photographer to be on hand to take a selection of quality, non-intrusive photos of the event. Every elected official likes to have photos of meetings with constituent groups. It's a good idea to send a photo along with the press release. Make sure you work closely with the legislator's office on press materials and planning.
- * Make it possible for employees, residents, and family members to meet the elected officials or candidates. Schedule the visit so that the elected official or candidate will have time to make brief remarks to assembled employees, or;
- * Arrange for some time when you and your senior staff can sit down with the legislator to discuss long term care issues.
- * Plan for the overall tour to be conducted by the administrator. Assign specific supervisors to explain the operation of their work areas. Prepare them so they are comfortable and not surprised by the visitors.
- * After the tour, ALWAYS send a thank-you letter to the officials who made the visit. It is a nice touch to include copies of photographs or news articles related to the tour.

Prepare a facility profile. . .

You should prepare a profile of your facility that shows its place in the community. Your facility profile should be a printed "take-away" document that will help visitors remember the most important economic and community impact messages about your facility – the same points you will cover during the tour. It should include:

- * Number of residents and services provided
- * Number of employees
- * Dollars paid in federal, state, and local taxes by your facility
- * Number of vendors who support your facility (highlight local vendors)
- * Unique services that you are providing to your employees, residents or the community (i.e., health seminars)
- * List of community service programs sponsored by your facility or your employees

Get publicity BEFORE the Legislator's visit. . .

- * Coordinate with legislator's aide who will notify your local media of time and place of his or her visit.
- * If the facility administrator handles this, send a letter or short news advisory to *city desks* for newspapers and *assignment editors* for local TV or radio.
- * Contact FHCA's Public Relations Consultant, Ed Towey, for help with the media.

SAMPLE PRESS ADVISORY FOR FACILITY TOUR

For Immediate Release

Contact: David Sylvester, Administrator, Health Central Park,
(407) 296-1613

What: Health Central Park will host a facility tour for Senator Daniel Webster to demonstrate the commitment to quality care for the elderly in our community, and how this reflects on issues affecting long term care and the resources needed to meet this commitment.

Where: Health Central Park
411 N. Dillard Street
Winter Garden, FL 34787

When: September 30, 2003
11 a.m.

Who: Senator Daniel Webster (Add any other VIPs who will accompany him or her; as well as key staff in the facility who will participate.)

Agenda: (Briefly describe the tour schedule, e.g., viewing daily operations, meeting residents, lunch, brief remarks to assembled employees.)

Conducting your tour. . .

- * **Always manage the actual tour yourself.** It is important to conduct the tour carefully so that no one in your facility is permitted to monopolize your legislative guest's time, which is as limited as it is valuable.
- * Before or after the meeting, show your legislative guest some of the realities of resident care and compliance with changing standards. **Emphasize quality resident care during the tour and throughout the visit.**
- * Show the legislator any area of the facility that has been subject to changing compliance standards or interpretations. Discuss the costs of achieving compliance.
- * If there is a regulation that poses particular difficulties in application for your facility – for example, storage of linen carts or cross contamination – point out to the legislator some of the “real life roadblocks” to compliance.
- * Point out as many types of residents as possible and discuss the range of care provided and the varied costs of that care. If you discuss types of disabilities be careful about patient confidentiality. You may want to include some heavier care and more confused residents, as well as the more alert ones to give a realistic and well-rounded picture to the lawmaker.
- * Talk to the legislator about the demographic tidal wave that will hit long term care. Explain that the current long term care financing system will not withstand this pressure. Then discuss possible solutions with the legislator.

Conversation with Legislators is easy. . .

Nearly all elected officials are born communicators. If not, they have learned. Talking with constituents is a top priority, and they do it practically every day. You should have no difficulty conversing in a friendly, easy manner throughout the tour.

During a meeting at the legislator's office, his or her staff may be included in your conversation. During a tour of your facility, involve other facility staff (department heads, director of nursing, employee of the month) in the conversation.

Asking “open-ended” questions will elicit more lengthy responses than just yes or no. Sample questions:

"From your legislative perspective, what do you see as the key issues affecting long term care in Florida today?"

"What can long term care providers concerned about a wide range of issues do to help address our legislative concerns?"

"How do you think we should address the rising costs of long term health care in the years to come?"

"Do you see the need for more community involvement in the legislative process? If so, what can we do together to help encourage additional involvement?"

Get full value out of your time. . .

A legislator's personal tour of your facility can make a strong lasting impression and speak volumes about our industry and our issues. It will also help establish your position as a subject-matter expert and a resource for the lawmaker. So consider using this powerful tool soon and often!

Summary of main points. . .

How to arrange a tour: Start with the legislator's local district office. Sound out the staff about the member's receptiveness to the idea. The best way to actually propose it is during a personal meeting with the legislator, but a formal letter of invitation is also acceptable.

When to schedule: When the member is in the home district. Offer several potential dates, possibly using a special event at your facility as a draw. The BEST time of all is during election campaign season when the official is actively looking for chances to meet with constituent groups.

What activities to prepare: Nothing elaborate or staged. A simple familiarization tour of the daily work of a long term care facility is informative enough. Interaction with a wide variety of residents and staff is central—maybe joining residents for lunch. Interaction with staff during the tour is important, too, and you should plan a meeting with the facility administrator and director of nursing. It is usually a good idea to arrange an opportunity for the visitor to speak with your assembled employees. Have a good photographer on hand who can take publicity photos without being too obtrusive—be sure to share these photos with the legislator later.

Make time for a "quiet" personal meeting: Set aside some time in your tour schedule for a one-on-one talk with your visitor about some critical issues facing our industry. This helps build your personal relationship with the legislator, and also helps establish you as a

subject-matter expert and information resource on long term care issues.

Questions to expect and materials to prepare: Be prepared for questions from the legislator and the staff people who will almost surely come along to take notes and learn from the experience. Know the number of residents, how many are on public assistance, their acuity level, how much you are paid for your services, and other basic data. Include these facts in a printed fact sheet that you have prepared in advance.

How to conduct the tour: Naturally. Just as with any other visitor, don't lobby them too much with political issues at this time. Just seeing your daily operations will ensure that the legislator never looks at long term care issues in the same way as before the tour. You will have achieved your purpose, and established yourself even more as an expert resource.

A Sample Agenda

10:00 – 10:30

Greet the legislator and any other guests in your reception area and then take them into the administrator's office for introductions and to summarize your operations with the aid of the Facility Profile you have prepared.

10:30 – 11:00

Complete facility tour, including time for interaction with residents and staff going about their daily routine.

11:00 – 11:30

Coffee in the administrator's office or conference room. This is the time for private conversation and a give-and-take session on questions involving long term care issues.

11:30 – 12:00

Brief remarks and a short question and answer session with assembled staff in the conference room. (The media can also participate in this segment.)

12:00

Lunch with residents in the dining room.

After lunch

Departure of your guest(s), with thanks and informational materials. Be sure to give them an open invitation to visit again.

Following up your tour. . .

As in your business and social life, prompt follow-up is an essential part of a successful political life. Following any visit to your facility by a public official your follow-up should be three things: immediate, courteous, and memorable.

Don't wait. Send a "thank you letter" similar to the sample we have provided the day after the facility tour, while the memory is still fresh in the mind of your visitor. Send a letter thanking any legislative staffer who helped make the visit possible.

Make your follow-up memorable. . .

To make it memorable, you should add some personal note about a subject that you discussed one-on-one with the legislator...or a comment they made in their remarks to your employees...some interaction they had with a particular resident... or a commitment they made to you about their continuing support for long term care issues. If something they said made a lasting impression on you, then tell them in your follow-up letter.

Another way to reinforce a legislator's recollection of the visit is to send them copies of the photographs you had taken during the facility tour, while they were meeting your residents and staff. You should also send any newspaper clippings about the event from the local press. These visual materials will be an appreciated asset to any legislator, and may end up being used at campaign time—further strengthening your personal connection.

Pictures, press cuttings, and personal references also make it more likely that the staff members who deal with correspondence will show your communication to the legislator personally.

A good follow-up plan. . .

- * Immediate: Write and send a short "thank you" letter, with any photos and press clippings you have available.
- * Immediate: If the local press has not covered the event, send the editor a brief write-up, including the tour agenda and any good photos of the public official.
- * Within a Week: Send a second communication if more photos and press clippings come in.

- * ASAP: Include an article about the tour, with photos, in your facility newsletter or any other in-house publication, including your bulletin board and Web site if you have one.
- * ASAP: Communicate with FHCA and let them know how the tour went.
 - * Summarize the visit.
 - * Send copies of any photos and press clippings.
 - * Mention any significant comments or commitments made to or about issues involving long term care.

FACILITY LETTERHEAD

SAMPLE: FACILITY TOUR "THANK YOU NOTE"

Hawthorne Health & Rehab Center
851 W. Lumsden Road
Brandon, FL 33511

September 4, 2007

The Honorable Marco Rubio
Speaker of the House
Florida House of Representatives
Room 420, The Capitol
402 S. Monroe Street
Tallahassee, FL 32399-1300

Dear Speaker Rubio:

On behalf of the residents and staff of the Hawthorne Health & Rehab facility, I want to thank you for making time in your very busy schedule to visit with us on September 1st. Everyone here greatly enjoyed meeting you and each of us was gratified by your obvious commitment to issues affecting the quality and future of long term care.

Your comments on private long term care insurance made a particularly lasting impression on me, and I'm sure, on our staff. It is reassuring for those of us committed to helping to meet the daily long term care needs of the elderly in our community that elected officials such as you share our commitment.

I know that your most valuable commodity is time, and we all appreciate that you have shared some of it with us. I look forward to speaking with you again soon. If I can be of any assistance, in particular when technically complex issues involving long term care are before you, please call on me any time.

Sincerely yours,

Deborah Franklin
Administrator

P.S. Enclosed are some the best photos we took during your tour of the Hawthorne Health & Rehab facility, as well as some press clippings about the event. I hope these will be of use to your staff for publicity purposes in the future.