



OFFICE OF STATE GOVERNMENT RELATIONS

State Health IT/Advocacy Day

Planning Manual

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Dear HIMSS Advocate:

HIMSS Government Relations grassroots education and advocacy program mobilizes support for the improved use of health information technology and management systems for improved healthcare and patient delivery. This State Health IT/Advocacy Day Manual provides HIMSS advocates and volunteers with resources and tools to plan annual Health IT/Advocacy Days with state elected officials as well as other government officials.

We advocate because the democratic political process of the United States is one in which the policies should represent the views of its citizens. Our elected officials are employed by their constituents and can only retain their jobs with the approval of the electorate. Therefore, you have a great deal of power and an enormous responsibility to your profession as well as your community.

Everyone can do it. Please forget the perception that you must be a high paid lobbyist to advocate for your issues. It is more important to be educated on the issues and to have anecdotal practical experience to share with government officials. We need your voice not your title in state capitals and legislatures across the country.

The use of this HIMSS State Health IT/Advocacy Day Planning Manual will provide the guidance and information you need to plan an effective Advocacy Day. Please read it in its entirety and contact [me](#) or [Meredith Pumphrey](#), manager of State Government Relations, should you need additional information and/or assistance. We can also be reached on 703/562-8813 or 8847, respectively. I look forward to working with you to plan a successful state Advocacy Day!

Sincerely,

Tom

Tom Keefe
Senior Director,
State Government Relations

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An Introduction to Advocacy and Grassroots Mobilization

In this manual, we view advocacy as one of the important elements or components of HIMSS Government Relations. We define advocacy as follows:

- It is the organization of information into arguments used to persuade an audience towards some attitude and predisposition to action.
- It is the act of persuading people using either verbal or nonverbal, and oral or visual communication to bring about their voluntary change in judgment, so that they will support a cause and adhere to a belief they may not have held before.

As an element of social mobilization, the end results of our work as frontline advocates are policies that protect, promote and sustain the use of healthcare information technology and management systems

Why is there a need for advocacy?

There are more serious economic, social, cultural and political threats facing healthcare today than ever. America's families cannot defend themselves from these threats. We need individuals and institutions that have the best interests of healthcare and knowledge of the use of healthcare IT and management systems to transform healthcare to stand in their behalf. We need short- and long-term planning and changes in policies and laws. The end-results of advocacy are public policies, including laws.

Who are our frontline advocates?

Any member of HIMSS can be an advocate. What is essential is that he or she has the best interests of healthcare IT and management systems at heart.

As HIMSS advocates, what qualities are important to become effective?

Commitment. We must see our responsibilities not merely as part of our eight-hour work. We have to be dedicated and committed to the cause—the transformation of healthcare through information technology and managements systems. We must be energized by our desire to help and serve and be challenged by problems and constraints we face.

Effective Managers. We must be aware of the situation of healthcare and healthcare IT in our area. We must set definite objectives. We must plan our strategies and activities based on the best use of the resources available. We must organize Advocacy events towards achieving the shared goal of a better quality of health and healthcare for all Americans. We must monitor and evaluate progress and the effects of our projects and adopt measures to address issues and problems.

Good Communicators. We must have not only good speakers but also active listeners. This means that we can express our thoughts clearly and have the ability to persuade our elected

officials. We must listen to the views of others and respond to their concern. We must be open to new ideas and even contrary opinions.

As communicators, we must use the right channel or medium for a particular audience at a given time. We must enter into a dialogue with our elected officials---a sharing experience rather than one-way process. We must build a “win-win” rather than a “win-lose” environment.

Planning Your State Advocacy/Health IT Day

HIMSS State Advocacy Days are one of the most important events of the year. However, to be effective, Advocacy Day must be timed so that we can have the maximum possible impact upon our legislators. Therefore, your state legislature must be in session. Check your state legislature's web site for this information.

Moreover, it is vitally important that we have excellent turnout at this event. This manual was created in order to help you prepare.

Encourage your chapter to think about Advocacy Day now to maximize your ability to get the planning off to a good start. See the Planning Timeline in the Appendix to keep your process on track.

Your plan of action and milestones are essential to making your state advocacy day a success. Use this manual as needed and please don't hesitate to contact Tom Keefe, Senior Director of State Government Relations, tkeefe@himss.org if you have any questions about this manual.

The Selection Process. A diverse committee is ideal. Include some people who have attended HIMSS Advocacy Day in Washington, DC. To get things done add new members who can provide fresh perspectives. People from a range of fields will come up with creative ideas, have more contacts, and increase the number of people reached by your Advocacy Day programs. Invite a local reporter to join the group and maximize your chances for media exposure and coverage.

Make Sure You Have Good Leadership. Discuss realistic time commitments and responsibilities with your committee members and identify individuals best equipped to lead the planning process. Elect a chair to lead the Advocacy Day committee and, perhaps, a vice-chair to take over next year.

Set Goals. Encourage your committee to come up with at least three goals for Advocacy Day. Do you want to support certain legislation, increase awareness of your HIMSS Chapter, or support funding of state HIT? Do you want to make your program more interactive, educational, or fun?

Match Your Programs to Your Goals. With goals in place, focus on programs that will help you reach them, keeping your target audiences in mind. Use the expertise of your committee members, and brainstorm options. There are various types of programs and agendas. For example, HIMSS Virginia and National Capital Area Chapters chose a one-day event that began at 8:00 a.m. and ended in the afternoon with a closing speaker. However, Oregon included their Advocacy Day with a previously planned conference. Several members of the chapter took time during the conference to go to the state Capitol and meet with state legislators regarding their legislative agenda. The New York Chapter sponsored a day long HIT Advocacy Day that included several co-sponsors, a briefing book, advocacy training and targeted meetings with legislators. (For more information, see the Appendix, Sample Agendas)

There are numerous options. Once you determine your goals, objectives and budget, explore all of your options and don't be afraid to be creative. You can sponsor an Advocacy Day annually so look for ways to build on the event year after year.

Message Development. Clearly defining an overarching message for the day and specific request of individual legislators is critical to success of an Advocacy Day. Your program should have both a large, thematic message and a definite "ask" that is connected to your thematic message. Your thematic message should set a broad context and be media and general public friendly. Your "ask" should be a direct and informed request to legislators and their staff about the action required. Be sure to keep it simple.

Training. Avoid sending members to meet with legislators without training based on your message. Members need to know the "ask," understand the theme, and appreciate the legislative and political climate/situation. Further, members should be able to articulate a clear and compelling argument, ideally supported by research, on behalf of the requested legislative action. It is also useful to provide members with some background on legislative process and effective means of working with legislators and staff. Training can take a variety of forms. Some Chapters may choose to provide members with written and online material in advance of the lobbying day. Others offer a training meeting before sending members to meet with legislators. Organizations opting to conduct training on the day of the lobbying activity can also combine this with motivational activities (see below). A tip sheet or talking points is a must.

Member Motivation. One effective technique for Advocacy Day programs is to provide a prominent speaker to both inform and motivate members for action. Usually, this comes in the form of a keynote speaker or a press conference. The speaker should be someone both recognizable and knowledgeable. It is especially useful if the motivator has, or had, a prominent role in government (at the local, state, or federal level).

Please note that a motivational presentation can also be provided by a respected leader within your organization. But it helps to have a rallying moment to "fire up the troops" and reinforce your message. A related issue to be considered is whether to make the motivation presentation public or private. A public presentation can involve a press conference or public rally. In contrast, a private presentation would be solely for your members and would dovetail with your training program.

Event Connection. Many lobbying day efforts also include one or more events in addition to the meetings with legislators. Many organizations begin with a breakfast meeting that provides training and/or motivation for the activities ahead. If you have a prominent speaker or a newsworthy release (for example, a legislative proposal roll-out, research report, significant new support for your cause from a key political figure or group), you might consider conducting a press conference. Other options for events include, evening receptions to honor key legislators, lunch keynote addressed to the members, or a joint rally with allied organizations.

Coordination. Effective Advocacy Days require coordination and logistical support. This need for coordination exists on two levels. You must identify which legislators are most important to achieve your objective. This might be members of the committee with jurisdiction over a bill or party leaders in the House or Senate. Once you have identified targeted legislators, match them

with specific constituent members and provide staff or Board support for those meetings. It is vital that constituents lead the meeting since they are the most persuasive voice you have.

However, do not leave these key meetings to chance. Make sure the constituent member is well-versed in the issue and the "ask," and support the constituent by sending other members to the meeting as well.

Resources and Research. If possible, provide members with something to leave with legislators and/or staff. Recent reports on the subject, supportive research or even a fact sheet are useful tools. If legislators and staff come to see your organization as a credible and reliable source of information, you will be far more likely to gain access and support. However, it is NOT sufficient to provide information without a specific request. Legislative staffers are driven by specific actions and required follow up. Simply leaving information, however well-prepared, will not serve your purpose. Tie your information packet to a request. As noted above, it is useful to provide members with resources to prepare for their meeting, such as sample scripts, talking points and fact sheets.

Partnership. Advocacy Days may be conducted by a single organization or a broad coalition. There are specific pros and cons to each approach. Single organization lobby days allow you complete message control and the opportunity to monopolize the public and political recognition (and credibility) such an event provides. However, single organization lobby days mean that you assume all the costs and development burdens of the event. And, obviously, you will mobilize fewer individuals.

Coalition efforts have the primary benefit of volume -- simply put, more people. Coalition efforts also allow you to "piggyback" on the credibility and access of other organizations. However, coalitions by their nature mean a certain loss of control. Be sure to secure a clear agreement regarding the day's message. Also, have clear discussions regarding logistical, staff, content, and financial support. In making the decision take into account your immediate legislative objective and whether or not it is best served individually or collectively. Ultimately, these decisions require a close evaluation of the specific local context.

Follow-up. This area is often overlooked but is of great importance. Provide a means for your members to report back the outcome of their meeting (See the Appendix – Meeting Report Form). Did the legislator make a commitment? Did the legislator indicate a preference or leaning? Did the legislator request more information? The status and outcome of each meeting should be documented for later lobbying use.

Also, make sure that members follow up after the meeting with a thank you. Some organizations even provide stationary and/or boilerplate text for this purpose. Finally, follow up with your own members after the legislative session or key vote to make sure that they are aware of how their representative ultimately voted on the issue.

Access HIMSS Staff Resources and Expertise. HIMSS provides assistance and resources with chapter lobbying activities. Contact State Government Relations for consultation and help with building your network!

Publicity and Promotion

Chapter Web Site. HIMSS has found the Internet to be particularly effective in communicating issues, educating members, organizing activists and inspiring people to act. Therefore, we encourage HIMSS Chapters to use their web sites to provide information and online registration.

HIMSS State Government Relations can also assist you in providing new and relatively inexpensive opportunities for advocating a cause to a broader audience. The reach of the Internet and the viral nature of email have spurred an increase in advocacy organizations turning to technology. Online advocacy can be extremely powerful when combined with offline efforts. Please see the Appendix for Sample Web Site Copy

Chapter Publicity. HIMSS national office offers several publications that list state activities. They are HIMSS Pulse on Public Policy, Chapter Leader E-News, and the Weekly Insider. These publications will also run an article (often with photographs) about your Advocacy Day. Please email your media advisories and press releases to HIMSS Manager of Public Policy Communication [Sharolyn Rosier Hyson](#).

Working with the Media

Define Your Message First. In today's world there is an abundance of information coming at us everyday. Given a chance to have the media run just one sentence from you — what would it be? Spend some time developing your main point, as this will be the most important part of your communications strategy and the foundation for everything else you convey. Choose a goal, and craft your message so that it supports that goal. Your message should be focused, timely, and relevant and you must stick to it. If you stay on message, you're winning half the battle.

Stay Informed. If you want to reach people through the media, you need to stay on top of what people are already talking about, which is often shaped by what's in the media (in a curious cycle). You also need to familiarize yourself with local controversies, keep tabs on which journalists are the ones writing about your issues, and follow closely the nature of the coverage your issues are receiving.

Gather Data. It's not enough to read newspapers and watch television; you should take an active role in shaping the news. Subscribe to all of your local papers and begin clipping stories that pertain to healthcare IT issues. Start a database that contains the names and contact information of the journalists covering your issues. Track the frequency with which these journalists write about your issues. When the time comes to make that pitch call to a journalist, you'll be able avoid pitching something they've already covered. Instead, you can woo them with your familiarity of their material.

Think Locally, Pitch Wisely. Journalists have very little spare time and are bombarded with pitches on a constant basis. It is more important that the information you send to them is timely and relevant and retains a human element that their readers will find interesting, than it is to send them lots and lots of stuff with your name on it. Remember, reporters are always looking for the

local angle. So, package your message or information in the context of a local story.

Try Different Tactics. Press releases are only one of many useful ways to pitch journalists. Be creative in your attempts to reach the public. Your message may be framed just as well within an op-ed article. If you have large budget, perhaps you'd like to hold a press briefing in a unique setting. On a smaller budget, be selective about the publications you think your target audience reads regularly and devote more time to pitching those outlets.

Choose the Right Tool. Each tool has its own benefits and drawbacks. Part of making the successful pitch is choosing the right tool. You may be familiar with some of these tools: press releases, media advisories, op-eds, letters to the editor, video news releases, public service announcements, print advertisements, flyer campaigns, press conferences, and staged events. You should consider the nature of your message, the level of urgency expressed, the "news" value, your budgetary constraints (if any), and your target audience when selecting your communications tool to ensure a good fit.

Provide Extras. Journalists love it when you make it easy for them to enhance a story. The less research that they have to complete on their own time, the more likely it is that they will use your material as the basis for their piece. You can assist print journalists by providing accompaniments such as photos, anecdotes, fact sheets, handy lists or rankings of relevance, contact and biographical information for topical "experts," and useful website addresses. Try to make all of your information available online, and include collateral research information.

Locating the Media. Want to write a letter to the editor? Getting started means figuring out where to write. Information on where to send op-eds or letters to the editor can usually be found on the editorial page of your local paper. If you are tracking journalists who cover your area of interest, be sure to pay attention to newspaper bylines. The Internet has become a tremendous resource for dealing with the media. Most newspapers and television stations maintain websites. Many newspapers even allow you to submit letters and op-eds online. Websites will usually give you the information you need when determining where to send a press release.

Play by the Rules. There are some standards that are part of the media relations game, and you'll tip your hand by ignoring them. Be sure to indicate whether the information contained in the release is free for use "immediately" or if it is "embargoed," for a later date and time. If you include a quote, obtain permission from your source before releasing. Media advisories should include only the most basic details (who, what, where, when, why and how).

Keep letters to the editor short and sweet. Return media calls promptly. Don't promise an exclusive to anyone unless you intend to give one. Never attack a journalist — if you need to disagree, do it firmly and with professional conviction, but avoid rudeness under any circumstance. **Tell the truth;** if you are unable to do so for any reason, then say nothing.

Talk F-A-S-T. Remember these tips for crafting an effective and compelling message for the media:

F is for framing. The frame is the big-picture rationale for why people should listen. A good frame drives home the overall importance and value of your message.

A is for analogies. Analogies do two things: allow the listener / reader to explore an idea with more familiar concepts; force the listener / reader to actively engage your idea.

S is for sound bite. Incorporate a few short, pithy, memorable phrases. These prompt recall of your message and make good copy for a journalist looking to capture a complex message in a compact, engaging manner.

T is for tale. It all comes back to simple storytelling. Stories make a lasting impression and humanize your message. Stories are also useful ways to relate a complex idea to the local context.

The Day of the Event

After the months and weeks of careful planning, your event is ready. Here are some considerations to make when setting up for the festivities.

Set-Up. Make sure the hotel/venue has a registration table outside the room. If media have confirmed they will attend, have a special press table at the event with press releases, supporting documentation and other information. It can also be a place for reporters to conduct interviews and learn about schedules and logistics.

Your podium should be equipped with a microphone and a "multi box" that allow radio and TV stations to plug into the sound system. Request a multi box only if broadcast reporters have confirmed they will attend. Most hotels charge for use of a multi box.

Signage. Your event should be clearly marked with identification and directional signs. Signage should be placed on the podium, outside the room and in the lobby area of the hotel/venue. You will also need signs and information on tables directing participants to a designated location prior to departing for their meetings with legislators.

Media Coverage

Media coverage on Advocacy Day

- Call assignment editors at local publications the morning of your event to see if your programs are on their assignment lists.
- Have someone on hand who can take quality photographs or a professional videotape of the event.
- Have a volunteer in place to receive reporters at your Advocacy Day to provide information and assistance.
- Introduce your spokesperson(s) to reporters for interviews.

Media coverage after Advocacy Day

- Create a post-event news release and send it to reporters with photos for follow-up stories. Include what transpired, who attended, and how many people were reached. For TV, mention the availability of videotape if you have one.
- Collect clippings from publications to inform your constituencies about your Advocacy Day success.
- Send a thank-you letter to any journalists who contributed to your planning or participated in a program or event.
- To help you plan for next year, keep a file including what worked and what didn't, your media contacts, and suggestions for the future.

HIMSS GOVERNMENT RELATIONS OFFICE

Congressional Affairs



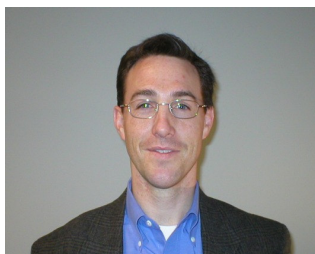
Dave Roberts, FHIMSS, MPA, is Vice President of Government Relations and Senior Executive for HIMSS' Virginia Office, which includes the Office of Advocacy & Public Policy (Government Relations). He is staff liaison to HIMSS Advocacy & Public Policy Steering Committee, a frequent public speaker, and a national columnist.



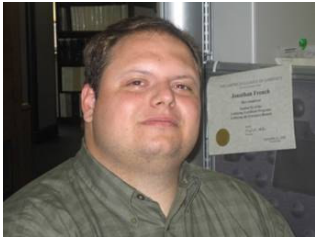
Blair Hedgepeth, BA, is Manager of Congressional Affairs and supports all congressional activities and is the point of contact for the Congressional Luncheon Seminar Series, Advocacy Day, Advocacy Breakfast, Friday Collaborative Group, GR Tracker, and Capitol Hill outreach. She is a graduate of Virginia Commonwealth University and the University of Connecticut Healthcare Information Technology Certificate Program.

Margaret McNamara is Coordinator of Congressional Affairs and supports Dave Roberts and the Government Relations team. She is responsible for coordinating the Advocacy & Public Policy Steering Committee, Legislation and Regulation Review Task Force, Globalization of HIT Work Group, Weekly Advocacy Leader One-on-Ones, Advocacy Activities Matrix, Payer/Life Sciences Roundtables and D.C. Office meetings.

Federal Affairs



Tom Leary, MALA, is Senior Director of Federal Affairs and responsible for all federal government executive branch liaison. Tom is staff liaison to the HIMSS Government Relations Roundtable (HGRR), where he is responsible for interacting with Diamond Corporate government relations members.



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State Government Relations



Tom Keefe, MA, is Director of State Government Relations and responsible for leveraging the grassroots capabilities of HIMSS chapters. Tom works to seamlessly integrate all state government relations activities to expand national HIMSS influence and expertise via our chapters. Tom is staff liaison to the Chapter Advocacy Liaison Roundtable (CALR).



Arnol Simmons is Coordinator of Government Relations and supports Tom Keefe and the State Government Relations initiative. He is responsible for coordinating the Chapter Advocacy Liaison Roundtable and the Levels of HIMSS certification program and the State Legislation Tracker II.

2007 Legislative Principles

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SUMMARY

The members of the Healthcare Information and Management Systems Society (HIMSS) believe lives can be saved, outcomes of care improved, and costs reduced by transforming the delivery of healthcare through the appropriate use of information technology (IT) and management systems. Our mission is to lead change in the healthcare information and management systems field through knowledge sharing, advocacy, collaboration, innovation, and community affiliations.

Since 1961, HIMSS has been the healthcare industry's membership organization exclusively focused on providing global leadership for the optimal use of healthcare IT and management systems for the betterment of healthcare. Today, with offices in Chicago, Ann Arbor, Washington D.C., Brussels, and other locations across the United States and the world, HIMSS represents more than 20,000 individual members and over 300 corporate members that collectively represent organizations employing millions of people.

Each year, HIMSS creates legislative principles for all stakeholders to consider for inclusion as provisions in any legislation proposed by the U.S. Congress or State Legislatures to transform healthcare. For 2007, HIMSS addresses eight separate categories of principles:

1. Funding and Incentives
2. Healthcare Delivery Transformation
3. Standards
4. Privacy and Security
5. Legal
6. Structural
7. Consumer Empowerment
8. Population Health Monitoring

Most importantly, HIMSS believes that the United States has a broad healthcare IT adoption gap. This gap is evidenced in every report published on this topic by reliable sources, and it is ever-widening. To address the gap, we believe that funding needs to tie directly to incentives. By linking these principles, HIMSS believes our nation can successfully transform healthcare.

Funding and Incentives

1.1

Fully fund all federal initiatives to provide critical resources to complete the goals of the President's Health Information Technology Executive Order for most Americans to have an electronic health record by 2014 or sooner. Initiatives include informing clinical practice, interconnecting providers, personalizing care, and improving population health.

1.2.

Reform reimbursement methodologies to: (a) provide incentives for higher quality of care; (b) enable health improvements through information technology; and, (c) overcome the broad adoption gap that is growing in our nation.

1.3.

Establish performance goals and reimbursement that can be supported to the largest extent possible by health information technology infrastructure.

1.4.

Provide grants and loans for the secure exchange of health information to federally recognized local/regional/state collaborations of providers, health settings, health plans, consumers, employers and others, grants and loans for enabling the secure exchange of health information in accordance with standards and policies as established by Department of Health and Human Services (DHHS).

1.5.

Provide grants and loans, or other incentives such as significant tax benefits, to healthcare providers for adoption of information technology that meet DHHS standards or certification criteria for providing patient care.

1.6.

Require that Federal and state government agencies provide sustainable incentives and remove obstacles to all sectors of the healthcare industry, including the private providers' practice, to overcome barriers to adoption of HIT (e.g. encourage provider incentives to proactively update encounter based data in personal health records).

1.7.

Expand Agency for Healthcare Research and Quality (AHRQ) research funding for health information technology.

1.8.

Provide additional funding to those entities that are developing/publishing standards.

¹ Strategies to implement initiatives included in Executive Order 13,335: Incentivizing EHR adoption, reducing the risk of EHR investment, promoting EHR diffusion in rural and underserved areas, fostering regional collaborations, developing a national health information network, coordinating federal health information systems, encouraging use of Personal Health Records, enhancing informed consumer choice, promoting use of telehealth systems, unifying public health surveillance architectures, streamlining quality and health status monitoring, and accelerating research and dissemination of evidence.

² Stakeholders include, but are not limited to providers, consultants, consumers, employers, federal and state agencies/coordination bodies, industry alliances, payers/insurance companies, providers (including safety net providers), public health agencies, purchasers, quality organizations, researchers, standard development organizations, think tanks, and vendors. Recommendations from an AMIA developed roadmap (<http://www.amia.org/inside/initiatives/cds/>) should be considered and incorporated where appropriate into any proposed legislation or regulation.

2. Healthcare Delivery Transformation

2.1.

Require the DHHS' Office of the National Coordinator for Health Information Technology (ONC), working with a broad community of stakeholders², to establish a prioritized health transformation roadmap to improve healthcare, quality management, acceptance and use of information management technology, and delivery. A comprehensive health transformation roadmap, that sets goals and priorities for healthcare improvement, including the creation of a national roadmap for clinical decision support, should be the basis for implementing other transformation activities including incentives, process and technology improvements, and legal reform.

2.2.

Encourage the National Quality Forum (NQF) and other nationally recognized entities that provide healthcare-related quality metrics, protocols and guidance to develop measures that support and implement these priorities based on electronic sources of data.

2.3.

Require DHHS to contract/consult with diverse stakeholders to build consensus and endorse sets of quality measures that could be used to reward providers that demonstrate above average performance in providing patient-centric care.

2.4.

Oppose legislatively mandated nurse-to-patient ratios that are fixed and universal, but support hospitals voluntarily applying flexible evidence-based ratios informed by research and local knowledge. HIMSS asks federal and state governments to resist the urge to pass legislation that mandates fixed, universal patient-to-nurse ratios.

2.5.

Encourage the responsible use of data at the secondary level by those with access to such data consistent with the AMIA Recommendations on Secondary Use of Data, including but not limited to:

2.5.1.

Transparent policies and practices for the secondary use of health data;

2.5.2.

Focus on data control rather than data ownership per se;

2.5.3.

Consensus on privacy policy and security;

2.5.4.

Public awareness;

2.5.5.

Comprehensive scope (beginning with a taxonomy); and

2.5.6.

National leadership.

2.6.

Encourage healthcare transparency in all operational aspects of administrative, financial, and clinical initiatives, being certain to preserve patient and provider privacy and security.

2.7.

Encourage and facilitate the portability of electronic health information.

3. Standards

3.1.

Require that Federal agencies' healthcare information technology architectures and system purchases conform to the interoperability specifications established by Healthcare Information Technology Standards Panel (HITSP). These systems should be certified by a compliance certification authority and require their adoption for use in government agencies' health programs and operations to promote health information exchange, including the electronic reporting of health data.

3.2.

Require that private sector organizations doing business with, submitting data to, or otherwise exchanging health information with Federal agencies utilize the same standards and information policies established by HITSP.

3.3.

Support upgrades to modern coding systems on a timely and regular basis and streamline the healthcare standards' implementation process by working with the industry in its rule-making process to determine how best to afford flexibility in keeping standards in pace with the industry.

3.4.

Expand government support to making standards available widely to industry and organizations for use in software and systems development.

4. Privacy and Security

4.1.

Require measures to protect the confidentiality, integrity and availability of personal health information that acknowledge and support healthcare as a dynamic, collaborative process among the patient, patient's family, healthcare providers and healthcare organizations.

4.2.

Require measures that acknowledge and support the authoritative role of the individual in managing privacy and health through his/her dynamic control of the collection, use, disclosure, and exchange of personal health information.

4.3.

Require measures that acknowledge and support the requirement of healthcare providers for timely access to accurate and complete health information in treating individuals who seek their care.

4.4.

Ensure the privacy and security of patient health information in regional and national health information networks through compliance with the Health Insurance Portability and Accountability Act (HIPAA) statute and regulations to accommodate for new technologies such as personal health records.

4.5.

Require any health information technology initiative to use information technology and telecommunications infrastructure that has been independently verified that it provides the high levels of information assurance, capacity, and availability required for safety-critical applications.

4.6.

Require measures that are consistent with the National Committee on Vital and Health Statistics (NCVHS) recommendations regarding "Privacy and Confidentiality in the Nationwide Health Information Network." These recommendations cover several topics central to the challenges for safeguarding health privacy in the NHIN environment: the role of individuals in making decisions about the use of their personal health information, policies for controlling disclosures across the NHIN, regulatory issues such as jurisdiction and enforcement, use of information by non-healthcare entities, and establishing and maintaining the public trust that is necessary to ensure the NHIN is a success.

5. Legal

5.1.

Reform Stark and anti-kickback statutes, as well as relevant sections of the Internal Revenue Code, to address potential shortcomings in the 2006 regulatory actions by legislating clear legal "exceptions and safe harbors" that will provide statutory protection for donors and encourage investment from the widest possible range of potentially interested parties. This should expedite the widespread adoption and use of community-wide health information exchanges that enables secure, community-wide portability and access to patient electronic health information for all authorized providers. Facilitate the development of health information networks at the regional and national level by permitting individuals to opt-out of such networks consistent with HIPAA.

5.2.

Reduce the cost of health information network development and facilitate adoption by providers by making such networks immune from liability for merely transmitting information, and by limiting civil liability for those providers who in good faith rely upon patient data provided through such networks.

5.3.

Remove the barriers that threaten the loss of tax exempt status for those organizations working to automate physician workflow.

5.4.

Remove incentives that encourage high cost legal action that is not necessary.

5.5.

Remove the legal barriers that prevent clinicians from actively using patient supplied clinical data.

6. Structural

6.1.

Support a Congressionally-chartered Office of the National Coordinator for Health Information Technology (ONC) as a direct report to the Secretary of DHHS.

6.2.

Support HITSP's public-private standards harmonization process for development of interoperability specifications including work products (e.g. standards, implementation guides, integration profiles, technical reports) to meet the critical common health information exchange needs as identified by DHHS.

6.3.

Develop roadmaps for Regional Health Information Organizations (RHIOs) so that they become self sustaining entities.

6.4.

Provide assistance in the establishment of RHIOs with a goal of zero failures.

7. Consumer Empowerment

7.1.

Encourage, facilitate, and drive consumer empowerment for healthcare decisions in order to increase patient/provider communications, reduce medical errors, increase patient safety, and positively impact the health and quality of life for all Americans. Support the use of technology (i.e., personal health records and electronic health records/electronic medical records) as enablers.

7.2.

Encourage and facilitate development and support of private and secure systems that allow patients to view and contribute to their complete electronic health record, including personal health records.

7.3.

Continually update personal health record data by providing public and private incentives that encourage consumer utilization of electronic health records.

7.4.

Promote free access to the Certification Commission for Healthcare Information Technology's (CCHIT) certified personal health records by consumers hampered by the "digital divide," (e.g., using public libraries to promote access to medical records through Internet access).

7.5.

Support patient rights to view his/her complete clinical record.

7.6.

Require measures that are consistent with the AHIMA e-HIM™ work group's PHR recommendations, including the definition and attributes of the PHR, minimum common data elements to be included in a PHR, and consumer education and tools to promote the PHR.

7.7.

Support creating electronic registries for living wills to provide clear direction to physicians on patients' choices, enable organ donation requests to be clearly delineated, and ensure that optimal and palliative care is given without necessarily prolonging life by patient choice.

7.8.

Support initiatives to improve efficiency and effectiveness of healthcare and reduce fraud in order to enable any savings to be used to expand coverage for those individuals with no healthcare options at all.

8. Population Health Monitoring

8.1.

Encourage the development of electronic health records that support rapid recognition and tracking of public health events that assists in information-sharing, proactive disaster planning, and rapid resource mobilization.

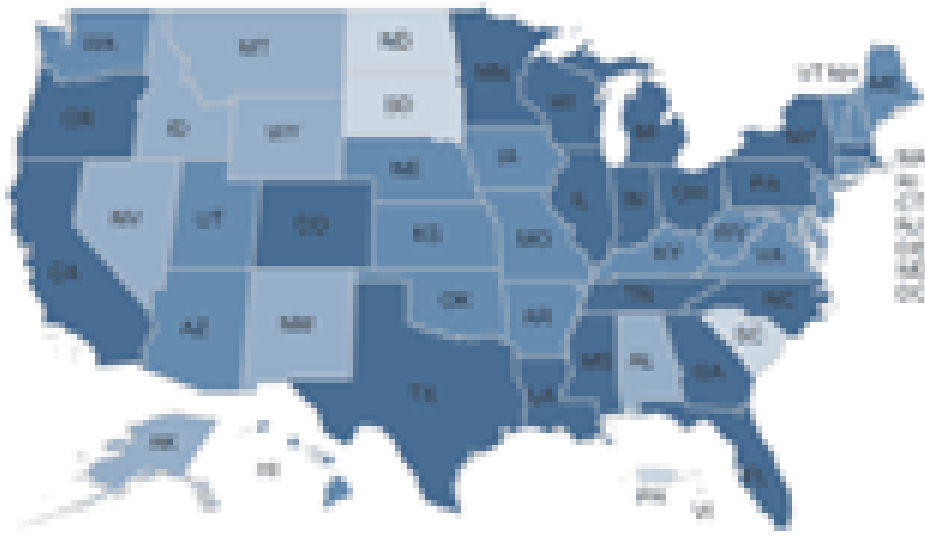
8.2.

Support initiatives that facilitate the flow of reliable health information among population health and clinical care systems necessary to protect and improve the public's health.

CONCLUSION

HIMSS is prepared to help all stakeholders ensure that these principles are enacted into law to transform our healthcare system. We are prepared to devote our available resources to help make these principles a reality. Please contact HIMSS at advocacy@himss.org.

THE HIT DASHBOARD



Visit the [HIT Dashboard](http://www.hitdashboard.com) for More Information on state legislation and initiatives, RHIOs, and HIEs.

[WWW.HITDASHBOARD.COM](http://www.hitdashboard.com)

Appendix

Sample Planning Timeline
Tips for Successful Advocacy Meetings
Sample Scheduling Letter (Meeting Request)
Scheduling a Visit with Your Elected Official
Sample Letter – Keynote Speaker
Sample Letter – Requesting Proclamation
Sample Marketing Email
Sample Marketing Email (Last Chance to Pre-Register)
Web site Copy
Sample Press Release
Sample Agenda
Sample Script
Sample Virtual March Letter
Sample Virtual March Letter using HIMSS Legislative Action Center
Legislative Meeting Report Form
Post-Meeting Checklist

Objective: The objective of HIMSS State Advocacy Day 2007 is to increase awareness of the benefits of health information technology among state legislators who have an interest in improving the quality and affordability of healthcare. A secondary objective is to introduce prominent members of the _____ healthcare community to state legislators and establish the HIMSS _____ Chapter as a valuable resource in the development of state healthcare policy.

HIMSS Advocacy Day Team:

Date:

SAMPLE TIMELINE:

| WHAT | WHO | WHEN |
|--|-----|------|
| Sponsor Initial Organizing Meeting (Organize committee, check State Legislature's calendar, identify possible date, etc.) | | |
| Review Advocacy Day plans with the Board | | |
| Schedule weekly conference call with HIMSS Chapter Advocacy Day Committee/Team (at least 5 months prior to event) | | |
| Hire or appoint an event coordinator | | |
| Reach out to a local college or university and see if they have a student who can assist the HIMSS Chapter prepare for Advocacy day | | |
| Design the overall event plan and budget <u>Include:</u> Venue & food service Labor Publishing costs Special equipment Decorations Acknowledgments/Speaker gifts | | |
| Select Advocacy Day venue | | |
| Register your event with HIMSS Government Relations at advocacy@himss.org | | |
| Identify key legislators. State Senate: House of Representatives: | | |
| Send a "Upcoming Healthcare IT events" e-mail to HIMSS Chapter general mailing list. | | |
| Conduct conference call with Tom Keefe, Senior Director, State Government Relations, HIMSS and HIMSS-OR chapter representatives. | | |

| | | |
|---|--|--|
| Draft key <i>messages</i> and talking points for legislator meetings. | | |
| Solicit the participation of co-sponsors. | | |
| Contact schedulers for Governor and state legislators | | |
| Develop Advocacy Day agenda/program | | |
| Invite speaker(s) | | |
| Solicit HIMSS chapter members for participation in legislator visits. | | |
| Schedule 30 minute meetings with legislators | | |
| Draft <i>HIMSS-Chapter Backgrounder</i> with HIT issue brief | | |
| <u>Web Site</u> Write copy for web page (See Appendix – Web Site Copy) Post Registration Form Post Advocacy Day Agenda/Program | | |
| <u>Media Relations</u> Develop media list Write Media Advisory Contact the media (invite them to the event and arrange interviews with speakers and Chapter leader(s)) Write press release | | |
| Appoint or hire a photographer | | |
| Solicit and schedule volunteers | | |
| Email marketing pushes to Chapter Members (monthly then weekly four weeks out) | | |
| Draft HIMSS Chapter Advocacy Day Agenda/Program | | |
| Draft & distribute combined <i>HIMSS Chapter Backgrounder</i> issue brief & talking points. | | |
| Develop list of legislator meetings. | | |
| Obtain legislator bios for HIMSS Chapter presenters. | | |
| Develop HIMSS Chapter presenter bios for legislators. | | |
| Assemble Advocacy Day packets for legislators and HIMSS Chapter presenters. | | |
| <u>Week of Advocacy Day event</u> | | |

| | | |
|--|--|--|
| Confirm logistics with hotel/venue selected Confirm volunteers (tell them where to be and when) Confirm speaker arrival time and greeter Print registration list Provide maps of the facilities for appointments and receptions. | | |
| Conduct post Advocacy Day review. | | |
| Publish closing report. | | |
| | | |
| | | |
| | | |
| | | |

Tips for Successful Advocacy Meetings

Meeting in person with elected officials and/or legislative staff is the most effective means of political advocacy. Here are some important "do's" and "don'ts" to ensure that your lobbying meeting is successful and effective.

DO

Make an appointment in advance. Time is always at a premium in legislative offices. Contact the legislator's scheduler in advance to arrange a meeting. It is best to make your meeting request in writing and follow up with a phone call. Be clear about who will be attending the meeting and the specific reason for the meeting. Legislative schedules are unpredictable so don't be put off if your meeting is rescheduled or if you have to meet with staff in lieu of the elected official.

Your homework. Prepare carefully and thoroughly for your meeting. Take the time to "know" your legislator by reviewing past votes or statements on the issue, his/her party's position, and committee assignments. Develop an agenda that all your participants clearly understand. Know your talking points in advance and be prepared to make your case. Research the opposition's arguments against your position and, if possible, acknowledge and rebut those arguments in your presentation.

Stay "on message." Effective legislative meetings should be narrow in scope. Stick to two or three major positions, state only a few key points in support of your position and make a definite request for action. Many meetings are ineffective because a participant brings up other issues or strays from the key arguments supporting your position. Have a message and stick to it.

Go local. Your effectiveness is based on geography. Legislators want to hear your thoughts and opinions because you are a constituent. One of your most useful strategies is to relate the issue and your position to your community. Legislators have many other avenues to get national or state analysis. Local statistics and stories are important and you can be the only source for such rich information. Don't be afraid to humanize the issue by relating it to your local experience.

Make a clear, actionable request. Many people are afraid that it's impolite to make a direct request. But, don't forget that the purpose of your meeting is to secure support for your issue. It is appropriate and expected that you will make a request at your meeting. The key is to make sure that your request is clearly articulated and actionable by the legislator. Keep in mind that your request should be timely and consistent with the legislative process. It is usually not enough to ask for generic support for an issue or cause, rather make a direct and specific request that is tied to pending legislative activity (if possible). For example, ask that a legislator co-sponsor a bill. You should make reference to bill numbers and be knowledgeable about the status of the bill. Making a specific request gives you the opportunity to evaluate the legislator's response.

Cultivate a relationship with staff. Many grassroots advocates underestimate the important role of legislative staff. A supportive staff person can often make the difference between success and failure. Staff plays an invaluable role in shaping a legislator's agenda and position on issues. It is important that you make every effort to cultivate a positive working relationship with staff. Over time, staff may even come to regard you as a helpful resource for information on your issue.

Follow-up. What happens after a meeting is almost as important as the meeting itself. Send a thank you letter after the meeting that not only expresses appreciation but reinforces your message and any verbal commitment of support made by the legislator or staff. If you promise during the meeting to get back in touch with additional information, be sure that you do so. Failure to follow up on your promise will call your credibility into question. Also, don't forget to report the results of your meeting back to ASLA or APA staff. This information is vital to coordinating overall legislative strategy and evaluating the impact of advocacy efforts. Stay informed on your issue and track how your legislator responds. Did the legislator follow through on his/her promise? If not, request an explanation. If so, express your appreciation.

DON'T

Go "off-message" or discuss unrelated issues. You must deliver a unified message during your meeting. Sending different messages or discussing unrelated subjects will only undermine your ability to secure support. Limit your advocacy to HIT issues only. Legislators meet with many groups and constituents so it is important that your message and request be clear and uniform.

Engage in partisan critiques. It is best to keep the discussion based on the merits of the policy or issue. Avoid characterizing your position in strictly partisan terms. Worse, do not make snide or disparaging partisan comments. You are working on behalf of an issue, not a party. So, you want legislators of both parties to support your position. Be careful not to alienate legislators or staff based on partisanship.

Use threats. While it may be tempting to tell a legislator who has rebuffed your request that "you'll never vote for him/her again" or that "you pay his/her salary," such discourtesy only ensures that your arguments will be discounted — now and in the future.

Be late. Time is a valuable and scarce commodity for legislators. Punctuality conveys professionalism and demonstrates your commitment to your issue, which is after all the reason for the meeting. Arrive early and if you are meeting as a group allow time to calm nerves and make a final review of the talking points and message.

Get too comfortable. Advocates are sometimes surprised by the courteous reception they receive, even from lawmakers who disagree with their position. As a constituent you will be accorded respect by the legislator and staff. Don't mistake this respect for agreement. Don't let the comfortable nature of the exchange deter you from making your request. And, don't mistake "concern" for your issue with support.

Sample Scheduling Letter

If you haven't already scheduled your meeting, use this template to draft a meeting request. Please see the guide to "Scheduling a Meeting with Your Elected Official" in this Appendix, and contact HIMSS State Government Relations staff with any questions or problems.

The Honorable [Insert Name]
123 Green Street
City, State 33333
Via fax: (333) 333-3333
Attn: Scheduler's Name
[Insert Date], 2008

Dear Representative or Senator [Insert Name],

The Healthcare Information and Management Systems Society (HIMSS) _____ Chapter is sponsoring Health IT Day on _____. Health IT Day will bring more than ___ senior and executive-level healthcare information technology (HIT) stakeholders to _____ to educate members of the General Assembly on HIT and the best use of management systems to transform healthcare. The attendees will include clinicians, IT executives, directors and managers who work in the state's healthcare provider institutions, payer organizations, the military and other branches of government, academic centers, and supplier and consulting companies.

As your constituents, we would appreciate an opportunity to meet with you to discuss the current state of HIT in _____ and how HIT is being used in states across the country to decrease healthcare costs and save lives. We have reserved _____ to _____ for meetings. We hope your schedule will permit a 15-20 minute meeting on _____.

Should you have questions or need additional information, I can be reached on _____. I thank you in advance for your time and attention.

Sincerely,

Your Name

Scheduling a Visit with Your Elected Official

1. **Know the name of the office scheduler.** This is the only person in the office who will be able to take your request for a meeting and this is whom you ask for by name when you call. When you send your letter of request, you should put it to the attention of this person to ensure that it gets to the appropriate desk for review.
2. Be prepared to **fax information to the scheduler** for review. This correspondence should provide a brief background of why you want to meet with the official and when. It is important to **mention that you are a constituent**, and while it is okay and usually helpful to state the issue you'd like to discuss, you should not be too opinionated on that issue in your letter. **See sample letter as an example.**
3. Keep in mind that officials have very busy schedules, so it is recommended that you ask to meet with them for only a 15-30 minute time slot.
4. It is recommended that before calling the scheduler you first **fax your request** for a meeting so they have time to look at the official's schedule and availability.
5. Next, **call the scheduler**, introduce yourself, mention that you are a constituent of Representative X, and let him/her know that you are following up on a request to meet with X in the district office. Let the scheduler know precisely when you faxed your request so he/she is more easily able to locate it.
6. Sometimes requests are lost in the chaos that typifies elected officials' scheduling offices. If the scheduler says that he/she did not receive your fax or cannot find it, don't panic. Calmly suggest that you can re-fax the same document or can send it via e-mail if that is most convenient.
7. If the scheduler tells you that the office needs more time to assess your representative's availability on that day, let him/her know that you will follow up by calling back in another few days. Please follow-up! Schedulers have many, many requests coming through the office, so in order to ensure that you are not forgotten or your request hidden under a stack of other papers, do **follow up and call again.**
8. Finally, **thank the scheduler** for their time and effort, and say you appreciate this opportunity to meet with your official.

SAMPLE LETTER TO KEYNOTE SPEAKER

The Honorable _____
(Title)
123 Street
City, State

Dear (_____):

On behalf of the officers and members of the Healthcare Information and Management Systems Society (HIMSS) _____ Chapter, I am honored to invite you to speak at our inaugural HIMSS Day at the General Assembly on (date) at the (location) in (city, state). HIMSS is the healthcare industry's membership organization exclusively focused on providing global leadership for the optimal use of healthcare information technology (IT) and management systems for the betterment of human health. Founded in 1961 with offices in Chicago, Washington D.C., Brussels, and other locations across the United States and Europe, HIMSS represents more than 20,000 individual members and over 300 member corporations that employ more than 1 million people.

This key public policy event will attract senior level healthcare stakeholders across (state) including clinicians, IT executives, directors and managers who work in our healthcare provider institutions, payer organizations, the military and other branches of government, academic centers, and supplier and consulting companies.

You are invited to address the audience in the opening keynote session scheduled from (time). We can possibly adjust this time to fit your schedule. Our attendees would like to hear you discuss legislative initiatives that are underway that will influence the growth, development and adoption of information technology in healthcare. This session is meant to give the audience an 'insider's' view on the why and what of legislative trends, and to inspire their interest and participation in the public policy process regarding these initiatives.

With your acceptance of this invitation, we look forward to working with you and your staff on logistics and other details. We thank you in advance for your time and attention.

Sincerely,

(Name)
President
HIMSS _____ Chapter

SAMPLE LETTER REQUESTING PROCLAMATION

The Honorable _____
Governor
State of _____
123 Street
City, State

Dear Governor :

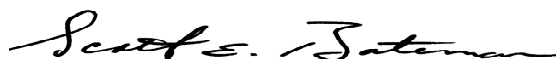
The Healthcare Information and Management Systems Society (HIMSS) _____ Chapter represents more than (number of members) (Georgians, Californians, etc.) who are dedicated to improving healthcare for all. We are sponsoring HIMSS Day at the General Assembly on (date). HIMSS Day will bring more than ___ senior-level healthcare information technology (HIT) stakeholders from across the state to share our professional experiences with members of the General Assembly on how information technology and management systems can be used to transform healthcare for all Virginians and improve patient safety. Our registered attendees include clinicians, information technology executives, directors and managers who work in the state's healthcare provider institutions, payer organizations, the military and other branches of government, academic centers, and supplier and consulting companies.

HIMSS Day at the General Assembly will be held at the _____. Attendees will also meet with members of the General Assembly in the afternoon. We are pleased that _____, (title), will provide a keynote address to our attendees.

We appreciate your leadership in healthcare, specifically, with the (if possible, list an initiative/legislation the Governor has introduced or signed pertaining to healthcare). We regret that your schedule does not permit you to attend our first statewide HIMSS Day. However, we are writing to request a letter of welcome and proclamation declaring _____, as HIMSS Day at the General Assembly. I have attached background information on HIMSS for your information.

Should you need additional information, please don't hesitate to contact (name, telephone, and email address). We thank you in advance for your time, attention, and leadership.

Sincerely,



(Name)
President
HIMSS _____ Chapter

SAMPLE MARKETING EMAIL

Subject: Register Today for the Inaugural Virginia HIMSS Advocacy Day – January 18, 2007

**2007 Virginia HIMSS
Day at the General
Assembly**

Thursday, January 18
Commonwealth Park Suites
Richmond, Virginia

The 2007 Virginia HIMSS
Day at the General
Assembly is a
complimentary event for all
HIMSS members.

The Inaugural Virginia HIMSS
Advocacy Day is jointly co-
sponsored by National Capital
Area and Virginia HIMSS
Chapters.

Inaugural Virginia HIMSS Day at the General Assembly

MAKE IT HAPPEN!

Thursday, January 18, 2007

Commonwealth Park Suites

Richmond, Virginia

HIMSS Members are invited to the **Inaugural Virginia HIMSS Day at the General Assembly**. This event will be held at the Commonwealth Park Suites on Thursday, January 18, 2007.

On July 20, 2006, Governor Tim Kaine issued Executive Order 29 creating the Governor's Health Information Technology Council. We need to keep this momentum going in the legislative branch. "Make IT Happen" is both the theme and purpose of the event. Helping the General Assembly understand the importance of healthcare IT **is what HIMSS is all about**.

The 2007 Virginia HIMSS Day at the General Assembly is a complimentary event for all HIMSS members. Take advantage of this unique opportunity to:

- Receive professional legislative action and spokesperson training,
- Meet with your members of the House of Delegates, Senate and other key decision-makers, and
- Hear from top level government officials leading the fight for healthcare IT including Secretary of Technology, Ansh P. Chopra (*invited*), Secretary of Health and Human Services, Marilyn Tavenner (*invited*) and Delegate *Dave Poisson..*

[Download the Agenda](#)

[REGISTER ONLINE](#)

SAMPLE MARKETING EMAIL

Inaugural Virginia HIMSS Day at the General Assembly

LAST CHANCE TO PRE-REGISTER!

DON'T MISS THIS OPPORTUNITY TO MEET... Virginia Secretary of Technology Ansh P. Chopra

Thursday, January 18, 2007

Commonwealth Park Suites

Richmond, Virginia

REGISTER NOW!

HIMSS Members are invited to the Inaugural Virginia HIMSS Day at the General Assembly at the Commonwealth Park Suites on Thursday, January 18, 2007. It's important that you pre-register for this inaugural event.

On July 20, 2006, Governor Tim Kaine issued Executive Order 29 creating the Governor's Health Information Technology Council. We need to keep this momentum going in the legislative branch. "Make IT Happen" is both the theme and purpose of the event. Helping the General Assembly understand the importance of healthcare IT is what HIMSS is all about.

The 2007 Virginia HIMSS Day at the General Assembly is a complimentary event for all HIMSS members. Take advantage of this unique opportunity to

- Hear from top-level government officials leading the fight for healthcare IT including Virginia Secretary of Technology Ansh P. Chopra and Delegate Dave Poisson;
- Meet with your members of the House of Delegates, Senate and other key decision-makers; and
- Receive professional legislative action and spokesperson training.

PLEASE NOTE: Schedule appointments with your state legislators now. Contact information for legislators is online at <http://legis.state.va.us> (click on "Senators" or "Delegates").

[Download the Agenda](#)

SAMPLE WEBSITE COPY SAVE THE DATE

Virginia HIMSS Day at the General Assembly:

SAVE THE DATE...VIRGINIA HIMSS DAY at the GENERAL ASSEMBLY

HIMSS Members are invited to the Inaugural Virginia HIMSS Day at the General Assembly. This event will be held at the Commonwealth Park Suites on Thursday, January 18, 2007. We will meet with the General Assembly members to ensure that health IT public policy issues take center stage in Richmond, VA.

On July 20, 2006, Governor Tim Kaine issued Executive Order 29 creating the Governor's Health Information Technology Council. We need to keep this momentum going in the legislative branch. "Make IT Happen" is both the theme and purpose of the event. Helping the General Assembly understand the importance of healthcare IT is what HIMSS is all about.

The 2007 Virginia HIMSS Day at the General Assembly is a complimentary event for all HIMSS members. Take advantage of this unique opportunity to:

- Receive professional legislative action and spokesperson training,
- Meet with your members of the House of Delegates, Senate and other key decision-makers, and
- Hear from top level government officials leading the fight for healthcare IT including Secretary of Technology, Ansh P. Chopra (*invited*), and Secretary of Health and Human Services, Marilyn Tavenner (*invited*) and Delegate Dave Poisson.

Download the Agenda ([LINK TO AGENDA](#))

Online Registration (Coming Soon!)

For more information contact:

Cathryn Stam, PMP, FHIMSS
(804) 366-1206
Cathryn.Stam@IAMConsulting.net

Blair Hedgepeth
Manager, Government Relations
HIMSS
703-837-9810
bhedgepeth@himss.org

Media Contact: Sharolyn Hyson
HIMSS
703-837-9819 (o)
202-421-7767 (c)

FOR IMMEDIATE RELEASE

HIMSS VIRGINIA AND NATIONAL CAPITAL AREA CHAPTERS SPONSOR INAUGURAL HIMSS DAY AT THE GENERAL ASSEMBLY

Richmond, VA (January 18, 2007) –The Healthcare Information and Management Systems Society (HIMSS) Virginia and National Capital Area (NCA) Chapters are gathered in Richmond today for their inaugural Virginia HIMSS Day at the General Assembly to advance the best use of healthcare information technology and management systems to transform healthcare.

“Today is a very special day in the history of HIMSS and healthcare IT in the Commonwealth of Virginia,” said Scott Bateman, president of HIMSS Virginia Chapter. “We have the honor of hosting the association’s first state Advocacy Day. This is definitely the perfect time to be in Richmond – we have a Governor who values and understands healthcare IT, we have newly elected state officials who want to learn the benefits our industry brings to healthcare, and we as individuals and as an organization are committed to educate, inform, and forge relationships with our state representatives that will benefit us individually and collectively.”

“We have more than 60 healthcare IT professionals attending our inaugural HIMSS Day at the General Assembly and that in itself justifies our theme, MAKE IT HAPPEN, because we can MAKE IT HAPPEN,” said Dan Blum of the NCA Chapter. “We do it everyday but far too many of our state and local elected officials don’t know or understand our industry. We are here today to make a difference, to bring knowledge and information of the industry to the General Assembly and to show them how healthcare IT saves lives and saves money.”

By leveraging the strength of our chapters, Virginia HIMSS Day at the General Assembly is the type of grassroots mobilization we need to transform healthcare at the state and local level, said HIMSS Executive Vice President Carla Smith. "I commend Virginians for taking the lead and making it happen in Virginia. There is no better group to educate elected officials on healthcare IT than HIMSS members who work in cities, towns and rural areas throughout the state.“

Virginia HIMSS Day at the General Assembly will be held at the Commonwealth Park Suites, Assembly Room, 901 Bank Street. Keynote speakers include: Virginia Secretary of Technology Aneesh Chopra; Delegate John M. O’Bannon, III, MD; and Delegate Riley E. Ingram. The media is invited to attend the keynote sessions, which are 8:00-9:30 a.m. and 2:00-3:30 p.m.

HIMSS is the healthcare industry's membership organization exclusively focused on providing global leadership for the optimal use of healthcare information technology (IT) and management systems for the betterment of healthcare. Founded in 1961 with offices in Chicago, Washington D.C., Brussels, and other locations across the United States and Europe, HIMSS represents more than 20,000 individual members and over 300 corporate members that collectively represent organizations employing millions of people. HIMSS frames and leads healthcare public policy and industry practices through its advocacy, educational and professional development initiatives designed to promote information and management systems’ contributions to ensuring quality patient care.



1st Annual Virginia HIMSS Day at the General Assembly
Thursday, January 18, 2007
Commonwealth Parks Suites, Assembly Room
901 Bank Street
Richmond, VA 23219

“Make IT Happen!”

- 8:00-8:15 am **Networking Continental Breakfast Reception**
- 8:15-8:30 am **2007 Virginia Advocacy Day Overview**
- *Scott Bateman, PMP, CPHIMS*, Virginia Chapter President
 - *Dan Blum*, National Capitol Area Chapter Representative
 - *Carla Smith, NCMN, FHIMSS*, Executive Vice President, HIMSS
- 8:30-8:45 am **2007 General Assembly Legislative Briefing**
- *Tom Leary, FHIMSS, MALA*, Director, Federal Affairs, HIMSS
- 8:45- 9:30am **Opening Keynote Address**
- *The Honorable Aneesh P. Chopra*, Virginia’s Secretary of Technology
- 9:30- 9:50am **2007 General Assembly Legislative Training Session**
- *Christopher Kush, MPP*, President, Soapbox Consulting, LLC
- 9:50-10:00 am **Walk to the General Assembly Building**
(Approximately 2 blocks)
- 10:00 – 12:00pm **Meetings with Legislators and Legislative Staff**
- 12:00-1:45pm **Networking Lunch and Debrief (Commonwealth Park Suites)**
- *Christopher Kush, MPP*, President, Soapbox Consulting, LLC
- 1:45-2:00 pm **Break**
- 2:00-2:30pm **Keynote Address**
- *The Honorable Dr. John M. O'Bannon, III*, Vice-Chair, Health Subcommittee, Member, 73rd District, Virginia House of Delegates
- 2:30-3:00pm **Keynote Address**
- *The Honorable Riley E. Ingram*, Member, 62nd District, Virginia House of Delegates

3:00-3:30pm

Concluding Comments

- *Greg Walton, FHIMSS*, Senior Vice President, HIMSS

INAUGURAL HIMSS VIRGINIA ADVOCACY DAY

PROGRAM SCRIPT

JANUARY 18, 2007

8:15-8:30 A.M. WELCOME

Scott Bateman, PMP, CPHIMS, Virginia Chapter President

Good morning and welcome to the inaugural HIMSS Virginia Advocacy Day, sponsored by the National Capital Area and Virginia HIMSS Chapters. As most of you know, I am Scott Bateman, president of the Virginia Chapter.

Today is a very special day in the history of HIMSS and healthcare IT in the Commonwealth of Virginia. We have the honor of hosting the association's first state Advocacy Day. Moreover, this is definitely the perfect time to be in Richmond – we have a Governor who values and understands healthcare information technology, we have newly elected state officials who want to learn the benefits our industry brings to healthcare, and we as individuals and as an organization are committed to educate, inform, and forge relationships with our state representatives that will benefit us individually and collectively. In fact, two healthcare I.T. bills have already been introduced in the House. You will hear more about that later.

I am pleased to announce we have more than 50 people here – representing a cross section of the industry. While this is our first Advocacy Day, I have no doubt it won't be our last (APPLAUSE)! We are honored that the National Capital Area Chapter agreed to join us in sponsoring this Inaugural Virginia Advocacy Day. The NCA's membership includes northern Virginia, DC and surrounding areas. While we are connected geographically, our members are also experiencing similar issues, problems, and challenges that we must share not only with our state legislators but with each other. We are only as strong individually as we are collectively.

Unfortunately, the President of the National Capital Area Chapter could not be here with us today but he sent a stellar representative in Dan Blum. Dan is an active member of the NCA Chapter and the immediate past chair of HIMSS Chapter Advocacy Liaison Roundtable. Please join me in welcoming Dan Blum.

Dan Blum, National Capitol Area Chapter Representative

Thank you, Scott. On behalf of NCA Chapter President Steve Erd, the officers, Board of Directors and members, I am delighted to be here with you today. I have been involved in Advocacy at HIMSS for more than 6 years and served as the first chair of the Chapter Advocacy Liaison Roundtable (CALR) for two years. I agree Scott with the fact that we are gathered here today for the organization's first State Advocacy Day is historic. In fact, it's monumental.

For years, our industry shied away from government and public policy issues. However, we realize we aren't unlike any other

industry. If our issues and concerns are to be heard, we must be at the table.

That's why I love our inaugural theme, MAKE I.T. HAPPEN. We can MAKE IT HAPPEN. We do it everyday but far too many of our federal, state and local elected officials do not know or understand our industry. That's why we must MAKE IT HAPPEN. We are one of America's best kept secrets!

Today is just the beginning of our journey to become a household name in the Commonwealth of Virginia. We thank you for being a part of history and ask you to spread the word among your fellow HIMSS members and colleagues. Like our national Advocacy Day in Washington, DC, Virginia HIMSS Advocacy Day is going to get bigger and better with each and every year. We are fortunate to have unparalleled commitment from HIMSS national office – from the Executive officers to Membership and Advocacy and Public Policy as evidenced here today. I'm sure I can speak for everyone in this room. We appreciate HIMSS' support, encouragement and dedication.

We are fortunate to have HIMSS Executive Vice President Carla Smith with us today. Carla is a Fellow of HIMSS and has been involved in the health information and management systems industry for more than 15 years. A certified nonprofit manager, Ms. Smith has an extensive history of work with nonprofit organizations, including seven years service as the Chief Executive Officer of the Center for Healthcare Information Management (CHIM).

As Executive Vice President of HIMSS, Carla has executive management responsibilities for the Society's areas of subject-matter expertise. In these capacities, she reaches across all healthcare settings, addressing Government Relations, Interoperability, Informatics, Research, Standards, Certification, Education, Privacy & Security, Quality, Safety, and Efficiency. Let's give a down-home Virginia welcome to HIMSS Executive Vice President Carla Smith.

Carla Smith, NCMN, FHIMSS, Executive Vice President, HIMSS

Thank you. Thank you, Dan. I am truly glad to be here to share in this historic occasion for HIMSS and the Virginia and National Capital Area Chapters. There's no doubt you have the support of HIMSS national office.

That's what HIMSS is all about – providing opportunities to network, educate, inform, and improve the healthcare information technology industry. We will be with you every step of the way. We are not a partner that you can divorce. As you endeavor to MAKE IT HAPPEN in the Commonwealth of Virginia, we will be here for you. We are truly in it for the long haul. As many of you know, our Office of Advocacy and Public Policy has grown exponentially over the past 6 years.

We realize much of the change in the healthcare IT industry will occur at the grassroots level. We are going to provide the essential resources for you here in the states to advocate for your jobs and your industry. Washington, DC is important but we must never forget

***all politics is local.* Members of Congress leave Washington every week for a reason. They need to hear from the grassroots -- the people who elected them. They need to get the PULSE of their cities, towns and rural areas. So let's continue this. I hope this is the first of many years of Virginia HIMSS Advocacy Days (APPLAUSE).**

I want to encourage all of you to mark your calendars for National Health IT Week in Washington, D.C., from May 14 – 18. On May 15, HIMSS will sponsor Annual Advocacy Day on Capitol Hill. This will be HIMSS sixth year offering our members an opportunity to come to the nation's capitol to meet with their national leaders and educate them on how healthcare I.T. and management systems can help transform healthcare.

So please save these dates. HIMSS Advocacy Day (May 15) and National Health IT Week (May 14-18) are perfect opportunities to not only become educated on federal issues but also to visit Capitol Hill and meet your members of Congress and their staffs. HIMSS national and state Advocacy Days are about – education, networking, and building our base of support for healthcare I.T.

That's why we are here...so let's get started on the education part of our agenda. I'd like to introduce HIMSS Director of Federal Affairs Tom Leary. Tom is a resident of Virginia and an active member of the National Capital Area Chapter. Tom has spent nearly a decade in and around federal healthcare policy and regulation. Prior to joining HIMSS, Tom was a Division Manager for SAIC's TRICARE Division. Tom was also Assistant to the Assistant Secretary of Defense for

Health Affairs, serving on the Assistant Secretary's senior management team that addressed medical readiness and peacetime healthcare delivery for the Military Health System.

Please join me in giving Tom one of those down-home Virginia welcomes (APPLAUSE).

8:15-8:30 Tom Leary

Presentation on Federal and State Legislation

Introduction of Aneesh Chopra – Tom Leary

For our inaugural Virginia HIMSS Advocacy Day here in Richmond, we have one of America's preeminent speakers on information technology -- Aneesh Chopra. Mr. Chopra is Virginia's fourth Secretary of Technology serving Governor Tim Kaine. In this capacity, he leads the Commonwealth's strategy to effectively leverage technology in government reform, promotes Virginia's innovation agenda, and fosters technology-related economic development with a special emphasis on entrepreneurship.

For the Governor, Secretary Chopra chairs the Solutions Committee of the IT Investment Board, the Effectiveness and Efficiency Committee of the Council on Virginia's Future, and the Healthcare IT Council in partnership with Health Secretary Marilyn Tavenner.

Prior to joining Governor Kaine's cabinet, Secretary Chopra served as Managing Director with the Advisory Board Company, a publicly-

traded healthcare think tank serving nearly 2,500 hospitals and health systems. He led the firm's *Financial Leadership Council* and the *Working Council for Health Plan Executives*, as well as assisted the launch of the firm's first business intelligence software solution, *Compass*.

Secretary Chopra graduated with a Masters in Public Policy from Harvard University's John F. Kennedy School of Government in 1997. He graduated with a B.A. from The Johns Hopkins University in 1994.

8:45-9:30 **KEYNOTE SPEECH – VA Secretary of Technology**
Aneesh Chopra

Presentation of HIMSS Gift -- Carla Smith

WOW, I heard about you but I really had no idea! We thank you for accepting our invitation. Now, we understand why Virginia is leading the country in so many ways in technology. We look forward to working with you on healthcare I.T. issues. Also, please know that when you need anything, HIMSS is here for you as a resource.

(Present Gift, Quick Photo Opt, Walk with Secretary out of Room,

NOTE: Please extend an invite to HIMSS AC; we'd like him to speak at the Advocacy Breakfast)

9:30-9:33 **Introduction of Christopher Kush – Dan Blum**

As President of Soapbox Consulting, Christopher Kush has trained thousands of citizens from all over the United States to effectively influence Congress, state, and local governments. He has helped

design sophisticated key-contact networks, Lobby Days, and grassroots training programs for many national associations including the National League of Cities, American Cancer Society, Easter Seals, and the U.S. Chamber of Commerce. Mr. Kush is the author of three books on grassroots organizing including *Grassroots Games* (ASAE, 2002) and, most recently, *The One-Hour Activist: The 15 Most Powerful Actions You Can Take To Fight for the Issues and Candidates You Care About* (Wiley, 2004). He has appeared on National Public Radio, ABC and Fox-news affiliates, C-SPAN's "Book TV," and in *U.S. News & World Report*, *The Los Angeles Times*, and on the Sirius Satellite Radio Network.

9:33-9:50 **2007 General Assembly Legislative Strategy Session**
Christopher Kush, MPP
President, Soapbox Consulting, LLC

Closing Remarks: Now you are prepared to meet your legislators. I am confident you know the message and have the right tools to make a lasting impression. We will now walk up to the General Assembly Building, which is just a few blocks away. As you leave the room, there will be people handing out folders to leave with your delegate and your senator. The purple folders are for members of the General Assembly and blue folders are for your use. Please take one purple folder for each of your visits. If you plan to drop by other offices, take an extra folder.

Also, don't feel like you have to go it alone! Feel free to pair up and go on your visits together. We have two hours and it's much easier to do 4 meetings in a group.

Once you get to the General Assembly Building, have your ID's ready to show and be prepared to go through metal detectors. We will be entering through the doors on the right hand side. If you have any questions, please see a Blair Hedgepeth or Cathryn Stam. Good Luck and we will all meet back here for lunch at 12 o'clock.

10:00-12:00 **Meetings with Legislators and Legislative Staff**

12:00-1:45 **Networking Lunch and Debriefing**
Christopher Kush

1:45-2:00 **Break**

2:00-2:02 **Introduction of Dr. John M. O'Bannon –**
Scott Bateman

Our next speaker is the Honorable John M. O'Bannon, III. Dr. O'Bannon is a member of the Virginia House of Delegates from the 73rd District, which includes parts of Richmond and Henrico County. Dr. O'Bannon is also vice-chair of the Health Subcommittee. A leading physician in Virginia, Delegate O'Bannon is currently is a partner in Neurological Associates, a leading Richmond medical practice. He served as Chief of Staff of Henrico Doctors' Hospital and is currently on the Hospital's Board of Trustees and its Ethics Committee. His peers have named him one of the "Outstanding Physicians of the Year" in Richmond Magazine's annual poll.

John is a national leader in improving the medical profession. He is a leader in the American Medical Association where he serves as a

member of the Council for Ethical and Judicial Affairs. Here in Virginia, John is a past Chairman of the Board of the Richmond Academy of Medicine. He has also been a past Chairman of the Medical Society of Virginia's Legislative Committee where he helped pass the Virginia Patients Bill of Rights.

John lives in Western Henrico with his wife Pat, a former public school teacher who is currently the Henrico County Supervisor for the Tuckahoe District. They have three adult children, John, Virginia and Andy, all graduates of Henrico County Public Schools.

Please join me in welcoming Dr. O'Bannon.

2:03-2:30 Keynote Address
The Honorable John M. O'Bannon, III

Presentation of HIMSS Gift -- Scott Bateman

Thank you Dr. O'Bannon. You have provided some valuable insight into the workings of the Health Committee and healthcare I.T. legislation. Please know that we appreciate your time and look forward to working with you on healthcare and healthcare IT issues. On behalf of our officers and members, I would like to present this gift as a token of our appreciation.

(Present Gift, Photo-opt, walk Delegate out the room)

2:30-2:32 Introduction of Delegate Riley E. Ingram – Dan Blum

This afternoon we are pleased to have another member of the House of Delegates – the Honorable Riley Ingram. Delegate Ingram

represents part of the Counties of Chesterfield, Henrico, and Prince George; and some of the City of Hopewell.

Delegate Ingram's committee assignments include: Counties, Cities and Towns, Privileges and Elections, General Laws, Appropriations, and Mining and Mineral Resources. As a Delegate, Riley makes himself accessible to the community year round in order to listen to the concerns and ideas pertaining to state issues. Prior to his election to the General Assembly, Delegate Ingram served on Hopewell's City Council and was Mayor from 1988 until 1991.

He served as chairman of the Hopewell Board of Equalization and president of the Hopewell-Prince George Chamber of Commerce. Currently, he is a member of American Legion Post # 146, Hopewell-Prince George Rotary, AF & AM Masons-Lodge 289, and ACCA Temple Shrine. Delegate Ingram is broker/owner of Ingram and Associates Real Estate Company, Inc. He and his wife, Mary Ann, have three children, Tracey, Stacy, and Riley, Jr.

Ladies and Gentlemen, Delegate Ingram.

2:30-3:00 Closing Keynote Address
The Honorable Riley E. Ingram
Member, 62nd District, Virginia House of Delegates

Presentation of HIMSS Gift -- Dan Blum

Thank you, Delegate Ingram. We appreciate your insight into the workings of the General Assembly. We look forward to working with here in the state capital. Please accept this token of our appreciation

for taking time out of your busy schedule this afternoon. Thanks again!

(Present Gift, Wait for Photo-Opt, Walk Delegate Out)

3:00-3:03 *Introduction of Greg Walton – Scott Bateman*

I think today has been a great success! Before we leave today, let me thank HIMSS Office of Advocacy and Public Policy for their leadership and support. HIMSS Director of State Government Relations Tom Keefe and Blair Hedgepeth, manager of congressional affairs, were instrumental in getting the ball rolling months ago. Also, we couldn't have pulled it off without the officers and active members of the Virginia and National Capital Area Chapters – Steve Erd, Cathryn Stam, and Rueben Southall. Cathryn took the lead in organizing our Inaugural HIMSS Day at the General Assembly and we sincerely appreciate her leadership.

We have had a series of successful meetings with our legislators, heard from some key government officials and now we have our friend, HIMSS Senior Vice President Greg Walton to provide us with some concluding remarks.

Greg joined HIMSS on Sept. 18. In a role with dual responsibilities at both the parent and subsidiary levels of HIMSS, Greg is responsible for the coordination of strategic planning and the enhancement of relationships with healthcare organizations. He brings diverse experience to this new position with expertise in information technology and clinical engineering management. Before joining HIMSS/HIMSS Analytics, he served on the Virginia Technology Task

Force and now acts as an Executive Advisor to the Virginia Health Care Technology Council. His previous experience also includes that of CIO for Carilion Health System in Roanoke Va.

3:03-3:30 Closing Remarks
Greg Walton, FHIMSS
Senior Vice President, HIMSS

SAMPLE VIRTUAL MARCH LETTER

(PLEASE NOTE: This letter should be used by HIMSS members and colleagues who cannot attend your state Advocacy Day.)

Dear State Representative/Senator:

I am writing you today as a constituent and as a member of the Healthcare Information and Management Systems Society (HIMSS). HIMSS is the healthcare industry's membership organization exclusively focused on providing global leadership for the optimal use of healthcare information technology (IT) and management systems for the betterment of healthcare. I would like to work with you to help raise the level of state government leadership of healthcare IT.

On (date), we will sponsor HIMSS Day at the General Assembly. Attendees will also meet with members of the General Assembly. Unfortunately, I cannot attend. However, I would like to share our state legislative goals with you.

- 1.
- 2.
- 3.

Finally, I would like to serve as a resource for you on healthcare IT issues. We can work together to lead an initiative or support an existing initiative. The Institute of Medicine estimates that between 44,000 and 98,000 Americans die each year from medical errors. Many more die or have permanent disability because of inappropriate treatments, mistreatments, or missed treatments in ambulatory settings. Studies have found that as much as \$300 billion is spent each year on healthcare that does not improve patient outcomes -- treatment that is unnecessary, inappropriate, inefficient, or ineffective. Healthcare IT is an enabler for clinicians working to improve the safety, quality and cost-effectiveness of health and healthcare.

Please feel free to contact me on (telephone or email address) if I can be of service to you as we advance the best use of information and management systems for the betterment of healthcare.

Sincerely,

Name _____
HIMSS _____ Chapter

SAMPLE VIRTUAL MARCH LETTER USING
HIMSS LEGISLATIVE ACTION CENTER (LAC)

(PLEASE NOTE: You must work with [HIMSS Office of State Government Relations](#) to use this format. The letters are generated via the LAC and emailed directly to the legislators.)



Dear Virginia and NCA Chapter Members:

Today is a very special day in the history of HIMSS and healthcare IT in the Commonwealth of Virginia. We have the honor of hosting the association's first state Advocacy Day. Moreover, this is definitely the perfect time to be in Richmond. We have a Governor who values and understands healthcare information technology, we have newly elected state officials who want to learn the benefits our industry brings to healthcare, and we as individuals and as an organization are committed to educate, inform, and forge relationships with our state representatives that will benefit us individually and collectively. In fact, two healthcare IT bills have already been introduced in the House.

More than 60 of your fellow members have come to Richmond to advocate. You can help our efforts by participating in our Virtual Advocacy Day. All you have to do is take a moment to send a letter to your elected officials. By sending a letter to your Delegate and Senator, you are showing them that healthcare information technology is an issue that should be brought to the attention of the General Assembly.

AND, IT'S EASY. All you need is your zip code, and the Legislative Action Center will help you step by step through the rest.

[GO TO THE VIRGINIA LEGISLATIVE ACTION CENTER NOW.](#)

Today is just the beginning of our journey to become a household name in the Commonwealth of Virginia. We thank you for being a part of history and ask you to spread the word among your fellow HIMSS members and colleagues.

Legislative Meeting Report Form

Background

Please complete a

separate form for each visit.

Member of Legislature: _____ Time of visit: _____

Was the Member present? Yes No

Did you meet with staff? Yes No

If yes, please provide their name(s) and title(s):

Requests

Did you describe the advantages of Electronic Health Records and other health information technology (HIT)?

Yes No Maybe

Explain:

Did the Member agree to consider HIMSS as a resource related to HIT initiatives and legislation?

Yes No Maybe

Explain:

Did the Member or staff make a specific request?

Yes No Maybe

Explain

How would you rate this meeting overall?

Excellent

Good

Fair

Poor

Explain

About You

Your Name: _____

Your Chapter (if HIMSS Member): _____

Other Lobby Day attendees who were present: _____

THANK YOU FOR YOUR SUPPORT!

Post-Meeting Checklist

Follow the steps outlined below when your meeting is complete. This checklist will help ensure that there is successful follow-up from your meeting. If you have any questions or need assistance, contact HIMSS Director of State Government Relations Tom Keefe at 703-562-8813.

- ⊕ **Complete and return your legislative meeting report form** to the Chair of your HIMSS Advocacy Day. Send [HIMSS](#) any digital photos from your visit for use on HIMSS website and publications.
- ⊕ **Send thank you notes.**
- ⊕ **Follow-up with any information or other items promised** at the meeting. ⊕ **Keep track of the issue and make sure that you monitor your legislator's actions.** If they follow through on a promised action, be sure to thank them. If not, encourage them to do so.
 - ⊕ When you get home, **send a note to the district staff.** Tell them about your meeting and offer to be a resource on planning issues in the district. Consider ways to get your information in front of them. For example, you can provide complimentary newsletter subscriptions, special reports, or invitations to chapter events. HIMSS can provide you with district staff names and contact information.
- ⊕ **Continue to build relationships with your state legislative delegation** by inviting them to attend or speak at chapter events, taking them to visit local projects, and keeping them informed about planning activities in the state.
- ⊕ **Work with HIMSS State Government Relations to monitor state legislative activity and continue to advocate on behalf of our federal legislative agenda.** Stay active in grassroots advocacy activities.
- ⊕ **Plan to attend HIMSS 2008 Advocacy Day on June 11, in Washington, D.C.**