



***Hosting an Effective Facility Visit:  
A Tool Kit***



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# Information



## **Key Member Responsibilities**

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IHCA intends to take a well-organized and aggressive approach to informing our elected officials about our issues and protecting our financial interests during every legislative session. Our first step in this endeavor is the assignment of a “Key Member” Facility to each and every elected official representing Indiana, from our U.S. Congressional delegation, to our statewide officials, to our members of the Indiana General Assembly.

Key Member Facilities serve as the point of contact for each elected official regarding inquiries relating to long term care and the issues that affect our industry most severely. Key Member responsibilities may include:

- Hosting Facility Visits
- Writing Letters and making phone calls to legislators
- Testifying on pertinent Legislation
- Participating in Political Action Committee (PAC) activities (such as fundraising events)
- Participating and organizing Key Member events

Are you a key member facility? Find out by visiting the members only site at <http://www.ihca.org> and click on “Grassroots.”

## ***About Facility Visits***

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Facility visits are an important first step towards building an effective relationship with your local legislator. Inviting your legislator to visit your facility will allow them to experience “a day in the life” in a long-term care setting. This has been an essential part of IHCA’s mission in changing the perception and stereotypes of long-term care.

Speaking to a legislator among residents, staff and family members will make a strong and lasting impression. Engaging your legislator in a discussion on the unique issues and concerns your facility faces is critical towards influencing public policy towards the betterment of the long-term care industry.

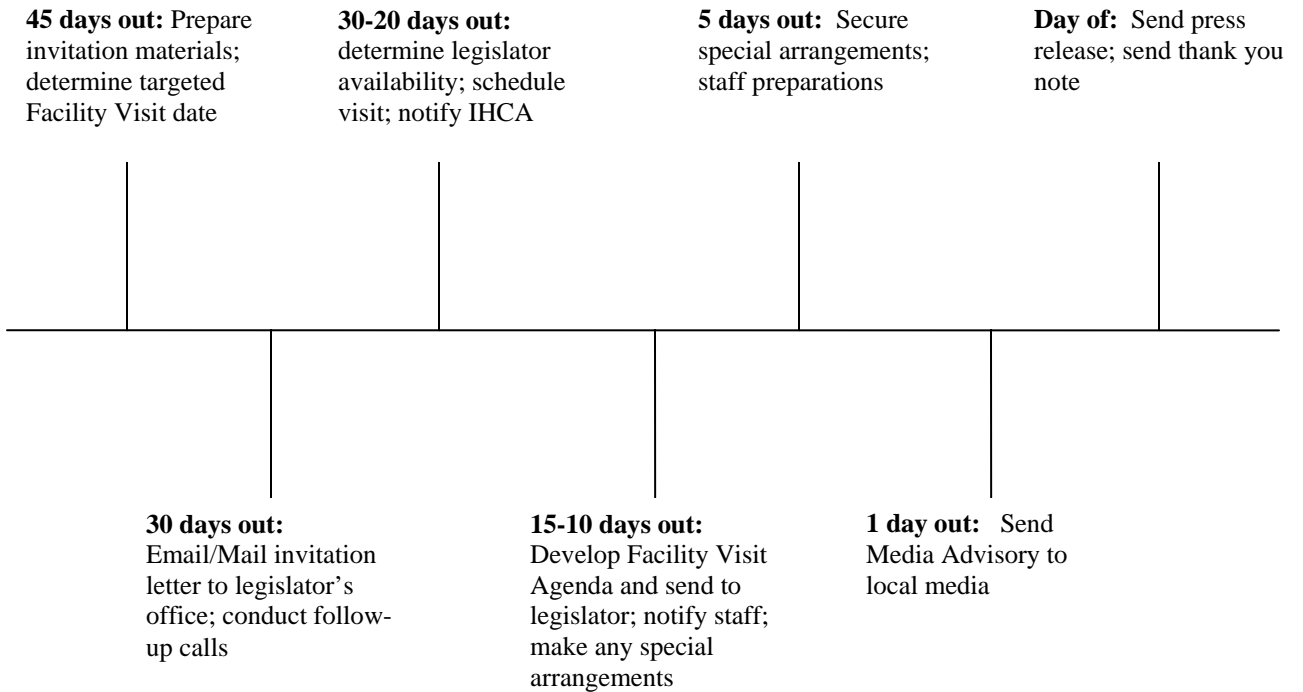
IHCA is your resource to build a productive and long-lasting relationship with your legislator. We are committed to helping you make your Facility Visit a success by helping you to prepare and being present during the visit to answer any questions.

To start the process to build a productive and long-lasting relationship with your legislator, contact a member of IHCA’s Legislative Team at 1-800-466-IHCA.

# Timeline



Hosting a successful facility visit starts with *early planning*. You should have an *Invitation Letter* sent to your legislator's office within a month of the date you would like the visit to occur. However, remember to be flexible; your legislator's schedule will mostly determine the date of the visit. Following a timeline will help simplify the scheduling process.



An *Invitation Letter* template is included in this Tool Kit.

## Legislative Information



Researching your legislator ahead of time will help you to have a more productive discussion. You can always find information about your legislator by visiting <http://www.ihca.org> and clicking on “Find Your Legislator” or <http://www.in.gov> and clicking on “General Assembly.” You can also visit IHCA’s Advocacy page to download and print issue briefs on current legislative issues.

Below is a sample of the information you will find on these sites:

**Legislator:** Karen Tallian

**Party:** Democrat

**Chamber:** Senate

**District:** 4

**Address:** 6195 Central Ave  
Portage, IN 46368-3645

**Business Phone:** (219) 764-0434

**State House Phone:** (317) 232-9472

**E-Mail:** [s4@in.gov](mailto:s4@in.gov)

**Assistant:** Michelle Moody



### **Biography:**

Senate: 2005-Present. Counsel to: Board of Zoning Appeals, Portage Township Trustees, Portage Fire Department Merit Board; Former adjunct professor, Valparaiso University Law School; Past president and board member: Portage Parks Foundation. University of Chicago (BS); Harrington Institute of Design (AA); Valparaiso University School of Law (JD). Term expires 2010. Committees: Civil Matters Subcommittee; Energy & Environmental Affairs; Pensions & Labor; Utilities & Regulatory Affairs. Seat #42.

**Website:** [http://www.in.gov/legislative/senate\\_democrats/homepages/s4](http://www.in.gov/legislative/senate_democrats/homepages/s4)

### **Authored Bills**

- SB0310 Death penalty and mental illness.
- SB0311 Use of medically accurate information in school instruction.

### **Committee Assignments**

- Civil Matters Subcommittee
- Corrections, Criminal, and Civil Matters

Source: <http://www.in.gov>

## ***Talking Points***

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### ***The Tour***

When your legislator arrives to the facility, introduce them to staff, residents, and family members. The Tour of the facility should be no more than 30 minutes. Be sure to point out programs you are especially proud of, or a staff member who continues to strive above and beyond the call of duty. It is especially important to allow the legislator to speak with your residents or family members who can validate the quality care they receive.

### ***The Discussion***

Following the tour, you will want to sit down with your legislator for 30 - 45 minutes in an informal discussion about your issues. Remember to honor their time frame and do not exceed the allotted time unless the legislator agrees to lengthen their stay. Feel free to invite a select few (no more than five) members of your staff to contribute to the discussion, such as department directors, nurse aides, the activity director, etc. Be sure to have a fact sheet or information ready about your facility. It would be helpful to include such facts as the number of patients that reside at your facility, the number of staff employed, community involvement efforts, etc. A *Legislative Brief* is included in this tool kit for you to give to your legislator.

Below are some talking points that you may use during the discussion portion of the visit. Don't forget to leave time for questions.

- Regulatory Oversight; Surveying Issues
- Medicaid Reimbursement
- Staff Recruitment and Retention
- Quality Assessment Fee
- Local Issues

For more information, contact a member of IHCA's Legislative Team at 1-800-466-IHCA.

## ***Working with the Media***

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Your Facility Visit is a newsworthy event for both you and the legislator. However, just because it is newsworthy does not mean it will be published. There are several techniques that you can use to make sure your facility visit gets the media coverage

1. **Speak with the Legislative Assistant.** Sometimes, a legislative assistant (also known as L.A.) will want to handle media or oversee media preparations and documents. Save time by calling the LA and speaking with them first.
2. **Define your audience.** Identify local or state media outlets you want to target. It's always helpful to utilize any press contacts you or your staff members already have.
3. **Craft your message simply.** When drafting a *Media Advisory* or *Press Release*, it is best to keep the material in a simple format. These documents should never exceed one page each. A *Media Advisory* and *Press Release template* are included in this Tool Kit. Remember that you are not writing the story; you are trying to get publicity for the visit, your facility and your legislator. Do not forget to contact your legislator's legislative assistant to ask if they have a preference on the media advisory and/or press release.
4. **Use your tools effectively.** Your Media Advisory should be sent to targeted media a week or a few days before the visit. After sending the Advisory, call your media contacts to ensure they received the advisory and confirm that they are aware of the visit. Always call the media back immediately. Even if you don't currently have the information they are looking for, it is best to return calls and inform them that you are working to gather information on their question.
5. **Allow sufficient time.** If the media is present at your event, be flexible with the visit schedule to allow media to conduct any interviews and take questions. Be sure to have fact sheets and any other information about your facility ready to give to reporters. You may want to compile this information with a press release into a media kit or press packet. This will make the reporter's job much easier.
6. **Follow-up is key.** Be sure to honor and commitments made to the media in a timely manner. After sending the press release to media the day of the visit, be sure to send a thank-you not to all media that attended. Keep records of any articles that are published. Keep in mind, there is always a possibility that the story will run later than planned or not at all. If this is the case, continue to focus on building media relations.

Remember: IHCA is here to help you reach out to your local media. Contact us 1-800-466-IHCA.

## *The Visit Schedule*

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The visit should last anywhere from an hour to an hour and a half. Your staff should be prepared well in advance. Be sure to have refreshments available at some point during the visit. If media is present, allot enough time for interviews and questions. Depending on the time of day the visit is hosted, you will want to follow a basic schedule maximizes the time that the legislator is present.

5 minutes	Greet Legislator
30 minutes	Facility Tour; Introductions of Staff
30 minutes	Discussion
15 minutes	Question/Answer

## ***Follow-up***

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Follow-up efforts are extremely important to the success of the visit. Your personalized, hand-written thank you-note should be mailed immediately to the legislator's office. You will also need to contact IHCA to let us know how the visit went, any immediate action items, concerns or comments from the legislator, requests for information or any other issues.

A formal *Follow-Up Letter* should be drafted and sent to the legislator's office within one to two weeks after the visit. The purposes of this important letter are:

- Thank the legislator for their visit;
- Invite them to share their thoughts on the visit and any legislative issues discussed;
- Confirm any verbal commitments that were made; and
- Reassert your role as their *Key Member Facility* that serves as the point of contact for inquiries relating to long term care and the legislative issues that affect the industry.

A *Follow-up Letter* template is included in this *Tool Kit* for your use.

# Templates

## ***Invitation Letter***

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Date

Name  
Office  
Address 1  
Address 2  
City, State, Zip

Dear [Name]:

[Facility Name] is a [nursing home/adult foster care/assisted living community/etc.] facility that provides quality long term care services for over [number of residents] senior residents of [City/Town]. We are proud to inform you that our facility has been named a *Key Member Facility* by the Indiana Health Care Association (IHCA). In this role, our primary responsibility is to serve your point of contact regarding any inquiries you have relating to long term care. In addition, with the support of IHCA, we will continually provide you with information on the latest legislative issues affecting the long term care industry.

There is much happening with long term and post acute care. We would like to invite you to visit [Facility Name] during the week of [dates]. Your visit would consist of a facility tour, introductions with residents and staff and a discussion on unique issues affecting long term care in your district. The visit would last for approximately an hour to an hour and a half.

We will follow up with your legislative assistant to confirm your availability. We look forward to working with you as your *Key Member Facility* to address long term care issues in your district and the State of Indiana. Please do not hesitate to contact me if you have any questions.

Respectfully,

Name  
Title  
Facility Name

Enclosures (if applicable)

# ***Media Advisory***

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## **Media Advisory**

**For Immediate Release: [Date]**

**Contact: [Contact person name, phone, email]**

### **[Legislator Name] to visit [Facility Name]**

**What:** [Facility Name] will host a facility visit with [Legislator Name] on [Date]. [Legislator Name] will tour the facility, meet with residents and staff and discuss local long term care issues with constituents. [Legislator Name] will arrive at [Time] for an hour tour and discussion.

**When:** [Date, Time]

**Where:** [Facility Name]  
Address 1  
Address 2  
City, State, Zip

**Background:** [Insert company information here]

[Facility Name] was recently named a Key Member Facility to [Legislator Name] by the Indiana Health Care Association (IHCA). As a Key Member, [Facility Name] is tasked with serving as the point of contact for [Legislator] regarding any inquiries relating to long term care and providing information on legislative issues affecting the industry.

[Company Mission Statement]

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## ***Press Release***

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**For Immediate Release:** [Date]

**Contact:** [Contact person name, phone, email]

### **[Legislator Name] visits [Facility Name]**

[CITY] — [Legislator Name] visited [Facility Name] on [Date] to see first-hand the care being provided to residents and discuss related issues facing the long term care industry. The visit was hosted on [Date]. [Legislator] spent approximately an hour touring the facility and meeting with residents and staff to discuss unique concerns and issues.

“[Quote from Legislator]”

“[Quote from Facility Administrator]”

[Facility Name] was recently named a Key Member Facility to [Legislator Name] by the Indiana Health Care Association (IHCA). As a Key Member, [Facility Name] is tasked by IHCA with serving as the point of contact for [Legislator] regarding any inquiries relating to long term care and providing information on legislative issues affecting the industry.

[Company Mission Statement]

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## ***Thank you Letter***

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Date

Name

Office

Address 1

Address 2

City, State, Zip

Dear [Legislator Name]:

On behalf of the staff and residents at [Facility Name], thank you for visiting with us on [Date of Visit]. We are thrilled that you had an opportunity to experience first hand the quality care that [Facility Name] strives daily to deliver to our residents.

We hope that the visit was as productive for you as it was for our facility staff and residents. Your feedback is very important to us and we welcome any questions, comments or requests for information you have regarding the visit and/or the issue briefs and legislative issues that were brought to your attention.

As your *Key Member Facility*, our primary responsibility is to serve your point of contact regarding any inquiries you have relating to long term care. We will continue to update you continually on the latest legislative issues affecting the long term care industry.

We look forward to working with you regarding long term care issues in your district and the State of Indiana. Please do not hesitate to contact me if you have any questions.

Respectfully,

Name

Title

Facility Name