



NATIONAL ASSOCIATION OF SOCIAL WORKERS

LOBBYDAY
TOOLKIT

CONTENTS

Planning a Successful Lobby Day	3
Lobby Day Plan Check List	
Lobby Day Plan Timeline	
Appointment Setting	10
Scheduling Appointment Phone Call	
Scheduling Report Form	
Lobby Day Packet Information	
<i>What you should give the elected official</i>	13
NASW Fact Sheet	
Sample Letter from Chapter Executive Director/President to Elected Official	
Sample Fact Sheet	
<i>What you should give the participant</i>	17
Talking Points	
Lobby Day Tips	
Lobby Day Dos and Don'ts	
Sample Follow-Up Report Form	
Sample Chapter Thank You	
Sample NASW News Article	
Glossary of Legislative Terms	21



CONTACT INFORMATION

National Association of Social Workers
Government Relations Unit
750 First Street, NE, Suite 700
Washington, DC 20002-4241
202-336-8218
www.socialworkers.org

June 2002

PLANNING A SUCCESSFUL LOBBY DAY

One of the most effective ways of letting elected officials know your organization's views on issues is through a personal meeting. In political terms, this is called lobbying. Lobbying provides members of Congress, state legislatures, and city council people with the information they need to make the best decisions for their constituencies.

Elected officials take heed to mass numbers—When a group of people from an elected official's district requests a meeting regarding a particular issue, the elected official wants to hear their point of view. Most elected officials want to make sure that they understand the consequences and benefits of any particular piece of legislation on their constituency.

Because lobbying can be so valuable in getting an organization's view known, the planning and implementation of a lobby day is very important. Your success will be based on how well you organize the members or students to the offices of elected officials to represent your organization's point of view. **Remember, “the appearance of power is power.”** The more effectively you plan for your grassroots lobby day at the Capitol or City Hall, the more seriously the elected officials your organization is trying to influence will view it.

BEFORE LOBBY DAY

Determine the format of your lobby day.

Groups organize their lobby days in many different ways. The most traditional technique is to organize members of your organization to go to the offices of the elected officials. However, organizations have been known to have receptions or forums, at which they invite legislators to speak on particular issues and take questions.

Determine the staging/meeting location for your lobby day.

This is the most important thing you will do. Make sure that the location you select is easily accessible to the offices of the legislators. If it is not easily accessible, you might consider providing transportation for the participants. For example, you can reserve a room in the Capitol building to stage your lobby day.

When selecting a staging site for your lobby day activities, be sure that the location's capacity is large enough for the number of participants expected. In addition, make sure that all of the technical equipment you might need is accessible. Your location needs to be accessible to people with disabilities.

Determine whether to provide lunch or snacks.

Your decision to provide food for your participants always comes down to your budget. According to how serious you are about your lobby day, providing lunch might be the best option to keep all of your members together before their next round of appointments.

Determine how appointments will be set.

It is very important to alert the legislators' offices about your lobby day. If an appointment is not set with the legislator's office, it is highly unlikely that you will have an opportunity to meet with a legislator or a staff member working on a particular issue. **It is imperative that you determine early who will set-up the appointments.** This can be a huge undertaking for one individual; however, if appointments are set in one central location, the organization can better determine the number of members attending each appointment. Scheduling of appointments should start no later than 30 days before the lobby day, preferably earlier.

Determine what issue(s) you will be lobbying.

Because the status of legislation changes on a daily basis, it can be a challenge to select the issue(s) you would like to focus your attention on during lobby day. Your issue(s) have to be determined before a notification or scheduling letter is sent to elected officials regarding the lobby day. Most offices will not set-up appointments if they do not know what they will be discussing.

Remember, you want to get the largest benefit from your lobby day. Legislators usually have limited time. At a meeting, the participant should educate the elected official on one or two issues and shore up his or her support. **Trying to discuss too many issues will only result in confusion and no commitment from the elected official.** Information on other issues can always be sent later.

Determine the contents of your Lobby Day Packet.

In order for the participants to have a positive lobby day experience, a lobby day packet is essential to guide them through their daily meetings. Packets should include but are not limited to:

- Agenda of the day's activities
- Appointments list
- Map of office locations
- Letter from executive director or president to elected official asking them to support your issues
- Talking points on the issues
- Educational information on the issue that can be given to the elected official
- Lobby day meeting follow-up report form
- Sample thank you letter
- Evaluation form

Determine the number of volunteers you will need.

You will not be able to hold down the fort alone on your lobby day. As the lead organizer, you will be taking care of many things that you did not anticipate. Here are some of the volunteers' roles on lobby day:

- Sign in participants.
- Hand out lobby day packets.
- Meet guest speakers and introduce them around the room.
- Help guide participants to the right offices.
- Handle the food.
- Recruit participants for other legislative activities your organization might be executing.

Determine who will take part in your training session for lobby day.

Preparing your participants for lobby day is very important. Take 30 minutes to one hour on that day to brief the participants on the issue(s) that they will be discussing in the meeting with their elected officials and answer any questions they might have. This time is also a good opportunity to perform a role-play exercise to ease jitters, reiterate the dos and don'ts of lobbying, and speak about the status of the legislation.

Determine whether to invite the media to your lobby day.

This is where the appearance of power comes into play. If you can get your local or statewide media to cover your lobby day, that can determine its success. If the media covers your lobby day and mentions the issues about which you will be meeting with legislators, pressure will be added to the legislators to support your view, especially if the media in their districts covered the lobby day. Try to use all media outlets, including television, radio, newspapers, and the Internet.

ON LOBBY DAY

Volunteers

Ask volunteers to come at least one and a half to two hours early so that they can help you set-up. During this time brief your volunteers on their duties and have them in position before the participants arrive. Make sure that your volunteers are identifiable by nametags or shirts.

Staffed Table

Clearly identify a contact location and number where a volunteer is always on duty to help participants with directions or questions. This location can be used for participants to return their follow-up report forms.

Elected Official Resource Table

Some participants will not know their elected officials. Have a tool in place that will help those participants identify their elected officials by name and face.

Information Tables

Invite other units from your organization to set-up a table to distribute information. This could be an opportunity for you to get participants involved in other legislative activities or provide them with information on other areas of the organization.

Cell Phone

Have a cell phone with you at all times. This is important if you have invited special guests to speak, because they will be able to reach you at any time regarding their status.

AFTER LOBBY DAY

Thank You Letters

Send thank you letters to your participants and volunteers. Each participant should be encouraged to send a personal thank you letter to the elected official or staff they visited. You should also consider sending a thank you letter from the executive director or president on behalf of the organization to ensure that every elected official involved receives an acknowledgement.

Evaluations

Review your evaluations and note where you could do better next year in implementing your lobby day.

Meeting Forms

Review the meeting forms and pass on any follow-up that might be needed to the appropriate person.

Wrap Up Article

Wrap up your efforts with an article in your chapter newsletter informing members of the results of your lobby day. The article could include the number of participants, the number of offices visited, the number of legislators that supported the issue, and the legislators your organization still needs to persuade.

Outstanding Debt

Remember to pay any outstanding debt that you might have incurred during the planning and implementation of your lobby day. Outstanding debt could be bills you incurred for catering, transportation, or sound equipment. You don't want to burn any bridges during this process.

LOBBY DAY – PLAN CHECKLIST

Before the Visit

- Determine the format of your lobby day. Will it be a reception that elected officials attend? Will participants actually go to elected officials' offices? Will participants set up their own appointments or will you organize appointments for everyone?
- Send appointment letters by mail and fax to the elected official's scheduler at least 30 days in advance of the scheduled lobby day.
- Follow up with a phone call to the scheduler after seven days to ensure that he or she received the information.
- Determine if you will offer transportation. Make sure you are aware of any special needs of participants.
- Find a meeting location and arrange lunch catering if applicable.
- Assemble a lobby day information packet that will include a schedule, maps, official letter to the elected official from the chapter president or executive director, summary of issues with talking points, lobby day report form, and sample thank you letter.
- Make sure that you have enough volunteers for that day.
- Prepare a 30-minutes to one-hour training session on lobbying.
- Send out a statewide press release regarding your NASW Lobby Day. If you want coverage at the event, send out an alert a couple of days before. If you want only written coverage without pictures or footage, you can send it out the day of the event. The press release should mention the issues that members will be lobbying on that day.

On Lobby Day

- Make sure that volunteers and staff are positioned to assist members with directions.
- Have a tool at the lobby day that will help members identify their elected officials.
- Prepare a collection station for the lobby day reports and evaluation forms after the event to ensure that you get as many forms back from participants as soon as possible.
- Have a sign-up table for people who are interested in participating in legislative issues after lobby day.
- Have a contact location and number with a person always on duty to help anyone with directions or questions.

After Lobby Day

- Send thank you letters to participants.
- Write a follow-up article for the chapter newsletter.
- Review evaluations to see how next years' lobby day can be more successful.
- Remember to pay any outstanding bills from the lobby day.

LOBBY DAY PLAN TIMELINE

Based on a four-month planning process

The date for your lobby day should already be selected. When you select a date, make sure that the legislator is in session. Once you have your date, you can begin to advertise your lobby day to your members in the newsletter, on your Web site, and at conferences.

120 Days Out

- Determine meeting logistics.
- Determine if lunch or transportation is needed.
- Determine whom you are going to lobby. (Will you lobby both the House and Senate or specific members?)

90 Days Out

- Start checking prices for catering and transportation if needed and look at tentative contracts.
- Create lobby day schedule.
- Discuss options for special guest speakers who will speak at your training.
- Start an intensive advertising effort to get members and students to attend the lobby day. Begin registration. This will help you determine your catering needs later.
- Determine who will schedule appointments for lobby day.

60 Days Out

- Determine lobby day handouts:
- Lobby tips
- Maps of your state's legislative building locations or city council offices
- Lobby report form
- Talking points and position papers
- Draft letter from executive director or president to members of congress, the state legislature, or the city council
- Draft press release
- Draft thank you letter

45 Days Out

- Determine what issues participants will be discussing and start drafting talking points.
- Draft letter from the executive director or president that will go into the packet of information for legislators on lobby day.
- Draft invitation that will be sent to legislators.

30 Days Out

- Send letters of invitation to elected officials. (If participants are scheduling their own appointments, this letter should be sent out at 60 days so that legislators' offices will be expecting a phone call from participants regarding a meeting.)
- If you are scheduling appointments, allow seven days and then make follow-up calls for appointments. If legislators did not receive invitation, fax them a copy.
- Find out if you will have to set up any special meetings for the leadership of your organization.
- Start recruiting volunteers to help with your effort.
- Order any materials you might need for lobby day such as pencils, folders, note pads, and nametags.

15 Days Out

- Prepare your meeting location and make sure that you have everything you need.
- Call people with whom you have contracts and make any last minute changes.

2 Days Out

- Send a press advisory to the media regarding the event.

Day of Event

- Send a more detailed press release to the media.

5 Days after Lobby Day

- Send thank you letters out the following week to elected officials and participants.
- Write a follow-up article for your newsletter.

APPOINTMENT SETTING

Following are sample materials for appointment setting. Whether the participants set their own appointments or you decide to take on this task, legislators should receive an invitation from the organization regarding the lobby day. This will alert them about the issue and allow you to give some history about your organization.

SAMPLE 1: ORGANIZATION INVITE LETTER

The (**Chapter Name**) of the National Association of Social Workers (NASW) will host its annual Lobby Day on (**Date**). NASW members will be walking the halls of the Capitol to discuss the (**Issue/Legislation**), (**give the status of the legislation and who is sponsoring it, if you have that information.**) This legislation would (**Tell what the consequence or benefit of this legislation is to your member or the people you serve**).

The NASW members from your district would like to meet with you or the appropriate staff member on (**date**) at (**time**) for 30 minutes to provide you with information on this important issue. Obtaining your support on this legislation is critical to the social work profession, and specifically to (**whomever this legislation would affect**).

NASW is the nation's largest organization of professional social workers. The national organization represents 150,000 members throughout the United States, its territories, and the international community. The (**Chapter Name**) has more than (**number of members**). NASW members are employed in a variety of settings, including public and private human services agencies, mental health facilities, schools, colleges, hospitals, business, and private practice.

The members of NASW in your district would appreciate a few minutes of your time to discuss how this legislation will affect your constituency.

(If you schedule appointment)

To schedule an appointment or for additional information regarding NASW's Lobby Day, please contact (**name**) at (**telephone number**) or by e-mail at (**e-mail address**). NASW would like to confirm all appointments by (**date**). I look forward to hearing from you and thank you for your consideration.

(If participant will schedule appointment)

Your constituent will be contacting you to schedule an appointment. However, if you have any questions regarding the (**chapter name**) lobby day, please contact (**name**) at (**telephone number**) or by e-mail at (**e-mail address**). Thank you for your consideration.

Sincerely,

Name
Executive Director or President

SAMPLE 2: PHONE CALL APPOINTMENT INSTRUCTION SHEET

1. My name is (name) and I am a member of the (your chapter name) Chapter of the National Association of Social Workers. May I please speak to the scheduler?
Write down the scheduler's name. Be sure to get the correct spelling.
2. My name is (name) and I am a member of the (your chapter name) Chapter of the National Association of Social Workers. We will be hosting a legislative day at the state capitol on (date). As a constituent of (elected official's name), I (we) would like an appointment to see the representative at (times) for 30 minutes.
Make every effort to get a meeting with the legislator, but some circumstances will only allow you to meet with their staff.
3. The issue we will be lobbying on is _____.
4. These are the names of the people attending the meeting _____.
5. Thank you for checking the representative's or senator's schedule. You can reach me at (telephone number or e-mail address). Always leave your name and phone number. You may have to contact the office several times before someone returns your call or confirms an appointment. Be persistent and proactive—you are calling as a voting constituent.
6. Keep very careful notes of all calls. Record the following information on the appointment report form:
name of the scheduler
when you called and the number of messages you left
name of person the appointment is with
time and place of the meeting.
7. Make appointments by (date) and send the appointment report form to:

Lobby Day Organizer
(Chapter Name) of NASW
Address
Phone Fax
E-mail

SAMPLE 3: SCHEDULING REPORT FORM

Scheduling Report Form

Your name _____

Chapter name _____

Names of people attending meeting _____

Representative/Senator name _____

Scheduler name _____

Name of person meeting with (if not the legislator, provide name and title of staffer) _____

Meeting location (room and building) _____

Meeting time _____

Date of confirmation _____

Record of contacts with the office

Instructions for Making Appointments

Thank you for participating in Lobby Day. Enclosed are materials to make appointments with your elected officials.

Making Appointments

Please make every effort to schedule appointments to meet directly with the elected official. Although it is common to meet with staff aides in a congressional office because they are integral to policy development, your representative or senator should make every effort to meet with you because you are a constituent. However, please understand that their schedules—which can change at the last minute—dictate their ability to meet with constituents.

Contact information for your elected official is enclosed. Please let us know if you encounter any problems.

Appointments must be made by (date). Please return the appointment grid to (name and contact information) by (date). The information on the appointment grids will be useful for both you and staff. Although you will be responsible for your appointments, staff can use the information to field questions from lost individuals or from members of Congress who call our office.

WHAT YOU SHOULD GIVE THE ELECTED OFFICIAL

A personal meeting with a legislator is the perfect opportunity to educate your elected official about your profession and organization. You do not want to overwhelm the official, but you do want him or her to leave the meeting with a better understanding of the role your organization or profession plays in particular occupational settings.

Some information you can put into a packet:

- List of your legislative staff with their contact information. This can be helpful to the legislator, because if they ever need information from your organization on a particular issue they will know whom to contact.
- Fact sheet on our profession. Many people have a misperception of what social workers really do.
- Letter from the executive director or president that explains why your organization supports the issue you will discuss.
- Fact sheet and information on the issue or legislation you will discuss.

SAMPLE 4: NASW FACT SHEET

Background and Mission

The National Association of Social Workers (NASW) is the largest organization of professional social workers with 150,000 members. With chapters in every state, NASW is a membership organization that works to promote the social work profession, advance social work practice, and shape public policy. About half of NASW members are clinical social workers in direct service.

Professional Social Workers

- Social workers are trained professionals who have bachelor's, master's, or doctorate degrees in social work. A social services employee, caseworker, or volunteer community worker is not a social worker unless he or she has a degree in social work.
- Professional social workers practice in a variety of settings, including human services agencies, mental health facilities, schools, hospitals, politics, and private practice.
- The Health and Human Services Administration identifies clinical social work as one of the four core mental health professions, along with psychiatry, psychology, and clinical psychiatric nursing. Of the core mental health providers, clinical social workers comprise the majority, 60 percent, nationwide.
- Only one-third of all professional social workers are employed by federal, state, and local governments combined.
- Only one-quarter of all child welfare cases are handled by professional social workers, and only 1 percent of NASW members work in public assistance.
- More than 200 professional social workers hold elective office, including two U.S. senators and four U.S. representatives.
- Professional social workers constitute 40 percent of the licensed mental health practitioners participating in the American Red Cross Disaster Services Human Resource System.

NASW Activities

- **Advocacy.** NASW's public policy advocacy includes lobbying for legislation and working through its political action committee.
- **Standards and Ethics.** To protect the public and ensure high-quality social work services, NASW sets practice standards, enforces a code of ethics, and works to improve state regulation of social work.
- **Credentials.** NASW offers voluntary professional social work credentials, including the Academy of Certified Social Workers, Diplomate in Clinical Social Work, Qualified Clinical Social Worker, and specialty certifications in school social work, case management, and alcohol, tobacco, and other drugs.
- **Professional Advancement.** NASW provides its members with services such as continuing education, professional journals and other publications, and specialty practice sections to meet diverse member interests.

SAMPLE 5: LETTER FROM EXECUTIVE DIRECTOR FOR PACKET

Letter sent by NASW Executive Director Betsy Clark for NASW's Lobby Day 2001

Date

The Honorable (name of elected official)
United States House of Representative or United States Senate
Address
Washington, DC 20010

Dear Representative or Senator (name):

I am writing on behalf of the National Association of Social Workers (NASW), the largest professional social worker organization with 150,000 members nationwide. NASW promotes, develops, and protects the practice of social work and social workers. NASW also seeks to enhance the well-being of individuals, families, and communities through its work, services, and advocacy.

Along with psychiatry, psychology, and nursing, clinical social work is one of the four core mental health disciplines. Clinical social workers bring a unique perspective to mental health diagnosis and treatment and have pioneered the integration of families and community resources into the treatment of Americans with mental disorders. Clinical social workers make up the largest group of mental health providers in the United States, roughly 192,000. As such, they witness firsthand the prevalence of mental disorders and the costs exacted from society.

I urge you to support legislation that would not only maintain, but also expand the availability of mental health services for Americans in every socioeconomic stratum, regardless of insurance status. According to the National Institute of Mental Health (NIMH), one in five Americans suffer from a diagnosable, treatable mental disorder in a given year—that is, 44.3 million people. The need for mental health services for these adults and children is not being met, as only one-third, 14.6 million, receive treatment in any given year.

It is critical to the economic health of our nation that all Americans be productive members of society and not be prevented from doing so because of mental illness. Four of the 10 leading causes of disability in the United States and other developed countries are mental disorders: major depression, bipolar disorder, schizophrenia, and obsessive-compulsive disorder. As calculated by NIMH, the annual cost of untreated mental illness to the United States is more than \$300 billion, with productivity losses due to missed days of work and premature death accounting for almost half that figure.

In this era of significant fiscal constraints, NASW is committed to fostering change in this area through the passage of several current pieces of legislation: the Clinical Social Work Medicare Equity Act of 2001 (H.R. 2294, S. 1083), the Mental Health and Substance Abuse Parity Amendments of 2001 (H.R. 162), the Mental Health Equitable Treatment Act of 2001 (S. 543), and the Bipartisan Patient Protection Act of 2001 (S. 1052). Thus, I ask for your support of these bills and others that address increased access to mental health services and full mental health parity. Should you have any questions or require further information, please contact Francesca Fierro O'Reilly with NASW Government Relations at (202) 336-8336. Thank you for your consideration.

Sincerely,

Elizabeth J. Clark, PhD, ACSW, MPH
Executive Director

SAMPLE 6: FACT SHEET ON YOUR ISSUE

Given to elected officials during NASW's 2001 Lobby Day Five Reasons to Support the Clinical Social Work Medicare Equity Act of 2001

Congress did not intend to bundle mental health services with other medical–social services to control costs for skilled-nursing facility patients under the Medicare Part B Prospective Pay System (PPS). Clinical social workers, *unlike* other mental health providers, such as psychiatrists and psychologists, are not exempted from the PPS.

Access to mental health services is critical to nursing home and rehabilitation facility patients who often experience depression and adjustment difficulties.

If clinical social workers are unable to receive Medicare Part B reimbursement for the mental health services they render in skilled-nursing facilities, patients in rural and other medically underserved areas will suffer. Clinical social workers are often the *only* mental health professionals practicing in these areas.

If skilled-nursing facility residents are lucky enough to receive treatment from another mental health provider, the cost per service will be higher. Clinical social workers charge 25 percent less than clinical psychologists for the same mental health treatment.

During 1998–2000, clinical social workers billed Medicare Part B less than \$4 million each year for mental health services rendered to skilled-nursing facility patients.

WHAT YOU SHOULD GIVE THE PARTICIPANT

You should give the participant the same information that the organization intends to give the elected officials. You want your participants to be familiar with the materials they will be presenting to the elected officials. Other information you should give the participant includes:

map

appointment times, locations, and telephone number

talking points

lobby day tips

dos & don'ts of lobbying

evaluation form

follow-up form

SAMPLE 7: TALKING POINTS

Lobby Day 2001 Talking Points on
the Clinical Social Work Medicare Equity
Act of 2001 (H.R. 2294, S. 1083)

NOT FOR DISTRIBUTION TO CONGRESSIONAL OFFICES

- **Present background facts:** Clinical social workers (CSWs) comprise the largest group of mental health practitioners nationwide (roughly 192,000 as estimated by Substance Abuse and Mental Health Services Administration versus roughly 33,400 psychiatrists and 73,000 psychologists).
- CSWs are independent providers and practice in a variety of settings, including private practices, nursing homes, and other health care facilities—billing insurers, including Medicare, directly for services rendered.
- CSWs are one of the three types of mental health providers that may be reimbursed for their services by Medicare; the others are psychiatrists and psychologists.
- **Identify the issue:** Clinical social workers in some areas of the United States are being denied Medicare Part B payment by Medicare Part B intermediaries for psychotherapy services rendered to skilled-nursing facility (SNF) patients.
- **Explain how the problem was created:** Before the implementation of the Medicare Prospective Pay System (PPS) through the passage of the Balanced Budget Act of 1997, CSWs could bill directly for their psychotherapy services in any setting. The PPS curtailed that ability in an SNF. Although the Medicare, Medicaid, and SCHIP Amendments Act of 2000 repealed Medicare Part B consolidated billing, the PPS still exists—from which CSWs are not exempt. As there is no definitive national policy on the provision of mental health services to Medicare patients as established by CMS (formerly HCFA), the decision of whether to pay is at the discretion of the Medicare intermediary. Some carriers pay for CSW services, including those rendered in the SNF setting; others do not.
- **Purpose a Remedy:** The Clinical Social Work Medicare Equity Act would ensure uniformity nationwide by adding CSWs to the list of practitioners exempted from the PPS, enabling them to bill directly for psychotherapy services rendered in SNFs—like their mental health provider peers, psychiatrists and psychologists. This action would not provide SNF patients with a new mental health benefit, but instead only clarify the billing mechanism. Congress clearly did not intend to include mental health services in the Medicare Part B PPS, as demonstrated by the specific exemption of psychiatrists and psychologists from the PPS.

SAMPLE 8: LOBBY DAY TIPS

During the Visit

- Introduce yourself and district.
- Start on a positive note by finding common ground. For example, if your legislators recently voted in support of an NASW issue, thank them.
- Clearly state NASW's position. This is key if your meeting is cut short.
- Use personal anecdotes. Explain your position with facts, and use personal stories when possible. Federal legislation affects you and your clients; make sure your legislators understand the personal ramifications or benefits resulting from their actions.
- If you don't understand something, ask for an explanation.
- Have the legislators clarify their position on the issue.
- Ask them to take some specific actions such as sponsoring a bill, voting for or against a pending measure, or meeting with your chapter.
- If you don't know the answer to a question, say so, but offer to get an answer.
- Thank them as you leave.

After the Visit

- Complete and return the lobby day report form; note any unanswered questions or information.
- Use the enclosed sample as a guide to write a thank you letter to the legislators summarizing your priority points.
- Share the results of your visits with your chapter, including insights about legislators' concerns, through your newsletter or listserv. Ask others to lobby.
- Maintain ongoing communication with legislators and their staff through letters, calls, and visits.
- Find out when legislators will be home in the district and organize a local visit.

SAMPLE 9: LOBBYING “DOS” AND “DON'TS”

DOS

- Do learn legislators’ committee assignments and where their specialties lie.
- Do present the need for what you’re asking the legislator to do. Use data or cases you know.
- Do relate situations in his or her home state or district.
- Do learn the legislators’ position and ask why they take that position.
- Do—in case of voting records—ask why he or she voted a particular way.
- Do show openness to the knowledge of counterarguments and respond to them.
- Do admit you don’t know. Offer to try to find out the answer and send information back to the office.
- Do spend time with legislators whose position is opposite ours. You can decrease the intensity of the opposition and perhaps change it.
- Do spend time in developing relationships with the legislative staff.
- Do thank the staff for stands the member has taken, which you support.

DON'TS

- Don’t overload a legislative visit with too many issues.
- Don’t confront, threaten, pressure, or beg.
- Don’t be argumentative. Speak with calmness and commitment so as not to put the legislator on the defensive.
- Don’t overstate the case. Members are very busy and you are apt to lose their attention if you are too wordy.
- Don’t expect members of Congress to be specialists. Their schedules and workloads tend to make them generalists.
- Don’t be put off by smokescreens or long-winded answers. Bring the legislator back to the point. Maintain control of the meetings.
- Don’t make promises you can’t deliver.
- Don’t be afraid to take a stand on the issues.
- Don’t shy away from meetings with legislators with known views opposite your own.
- Don’t be offended if a legislator is unable to meet and requests that you meet with his or her staff.

SAMPLE 10: FOLLOW-UP REPORT FORM – NASW CAPITOL HILL

FOLLOW-UP REPORT

Your Name: _____ Date: _____

Chapter: _____

Name of member of Congress _____

Name of person(s) met with (legislator or staff): _____

Principal staff member on the issue: _____

(Circle response or fill in the blank)

1. Who did you see? Member of Congress Staff
2. Was the congressional member/staff aware of NASW? Yes No
3. What issues did you discuss? _____
4. What is the position of the member of Congress on this issue?

- | | |
|---|---|
| Issue 1 _____ | Issue 2 _____ |
| ____ <i>Supports NASW's position</i> | ____ <i>Supports NASW's position</i> |
| ____ <i>Leaning toward NASW's position</i> | ____ <i>Leans toward NASW's position</i> |
| ____ <i>Position unknown/undecided</i> | ____ <i>Position unknown/undecided</i> |
| ____ <i>Leaning against NASW's position</i> | ____ <i>Leaning against NASW's position</i> |
| ____ <i>Against NASW's position</i> | ____ <i>Against NASW's position</i> |

5. What are your legislator's main concerns on this issue? _____

6. What does your legislator hear from constituents on this issue? _____

7. Follow-up needed from NASW staff:
- | | |
|--|----------------------------------|
| ____ <i>Call from lobbyist</i> | ____ <i>Additional materials</i> |
| ____ <i>Generate phone calls/letters from NASW members</i> | ____ <i>Other</i> |

8. Please rate the usefulness of the briefing where 1= Not at All and 5 = Extremely

1 2 3 4 5

9. How can the briefing be improved? _____

10. Was this a positive experience for you? Yes No

11. Other comments:

Please complete this form for each visit and return it to the NASW staff.

SAMPLE 11: CHAPTER THANK YOU TO MEMBER OF CONGRESS

Dear Representative/Senator/Staff:

I would like to thank you for meeting with me on behalf of the (state) chapter of the National Association of Social Workers (NASW) on July 19. I appreciate the opportunity to share our position on the Clinical Social Work Medicare Equity Act, S. 1083/H.R.2294, mental health parity, S.543/H.R. 162 and the Patients' Bill of Rights, S. 1052/H.R. 2563. I hope we can count on your support of these important bills.

As we discussed, clinical social workers (CSWs) are one of the four largest mental health provider groups. Passage of the Clinical Social Work Medicare Equity Act of 2001 (CSWME) would ensure uniformity nationwide by adding CSWs to the list of practitioners exempted from the Prospective Pay System (PPS). This exemption would allow CSWs to bill directly for psychotherapy services rendered in skilled nursing facilities. NASW believes that Congress clearly did not intend to include mental health services in the Medicare Part B PPS, as demonstrated by the specific exemption of psychiatrists and psychologist from the PPS.

Mental illness has a significant fiscal impact. Today, 4 of the 10 leading causes of disability in the U.S. are mental disorders. Mental health parity is a crucial issue and NASW believes that those diagnosed with mental illness should receive the most effective and least restrictive treatment acceptable to the client. Passage of the Mental Health Equitable Treatment Act, S. 543 or the Mental Health and Substance Abuse Parity Amendment, H.R. 162 would be economically prudent, affordable, and beneficial for business.

With regard to the Patients' Bill of Rights, now is the time for it to finally become a reality Please vote in support of the McCain-Edwards Kennedy/Ganske-Dingell Bill, S. 1052/H.R. 2563, defeat any weakening amendments, and strongly oppose any and all portions of the Fletcher alternative, H.R. 2315.

Once again, thank you for your time and hope that you will consider cosponsoring and/or voting in favor of any or all of the aforementioned bills. If I can ever provide you with additional information on these issues or on any other issue from the social worker perspective, please don't hesitate to contact me at (555) 555-5555 or our lobbyist, Francesca Fierro O'Reilly at (202) 336-8336. NASW and I look forward to working with you on this issue.

Sincerely,

(Your Name)
(Position)
(NASW Chapter)

LEADERS APPLAUD SPEAKERS, AWARD WINNERS

NASW MEMBERS SCHEDULE 130 CONGRESSIONAL LOBBYING VISITS.

By John V. O'Neill

NASW News

The 2002 election is a once-in-a-decade opportunity to elect many pro-choice, women Democrats to the Congress, said Emily's List founder and president Ellen R. Malcolm in a rousing call to action to open NASW's Annual Leadership Meeting (ALM) in July.

In other elections, about 98 percent of incumbents are reelected. But every decade in the election after the U.S. Census, congressional districts are reapportioned, creating open seats and opportunities to elect newcomers to office, said Malcolm. In the 1992 election, following redistricting, the increase in women Democrats elected was greater than in all other races in the 1980s and 1990s.

Emily's List supplies information to its members about candidates, gets checks from them and passes the contributions along to candidates. In that way, it avoids the \$5,000 limitations set on contributions from political action committees. In the last election, it received 96,000 candidate contributions, amounting to \$9.2 million for women Democratic candidates.

Malcolm recalled two decades ago when no Democratic woman had ever been elected to the Senate in her own right, and women candidates had a Catch-22 problem. They weren't taken seriously as candidates, so they couldn't raise substantial campaign contributions; therefore, they weren't taken seriously. In 1985, that changed when Emily's List made large, early contributions to Barbara Mikulski's Senate campaign, getting the attention of other potential contributors and helping make her a viable candidate.

Mikulski was elected to the Senate, where there are now 10 women Democrats. In 1988, there were 12 women Democrats in the House. Since then, 53 Democratic women have been elected to the House, more than 30 percent of them people of color, said Malcolm.

Rep. Susan Davis (D-Calif.), who beat an incumbent in a House race in 2000, told the ALM audience she never would have won without help from Emily's List.

She said she has used several skills she acquired during her social work training in her time on the San Diego school board, in the California Assembly and in the Congress: listening skills, connecting people to resources and building coalitions.

"You would be amazed at the casework we do every day in a congressional office - reaching out to find the person or institution that can help," she said.

She and other members are working for passage of the Clinical Social Work Medicare Equity Act to ensure that social workers are treated the same as psychiatrists and psychologists in billing for services in skilled nursing facilities.

NASW officials from around the country used the occasion of the ALM to schedule more than 130 visits with members of Congress from their home states. In the Senate, they focused on mental health coverage parity and the Medicare equity act. In the House, the emphasis was on those bills and the Patient's Bill of Rights.

During the five-day meeting in Arlington, Va., NASW chapter executives and presidents attended a number of workshops on how to provide member services and on social work trends. Meetings were held to discuss proposed changes in association governance.

At one workshop on “advancing NASW’s goals and advocacy through coalition building,” Carol Brill, Massachusetts Chapter executive director, said the way to be a major political force is through coalitions, but it requires analysis before joining them.

Her chapter is probably a member of 18 coalitions in varying roles. “You have to decide if you want to be a member in name only, an active member or involved in leadership,” she said. “Probably in three-quarters, we are members in name only. You have to pick and choose very carefully which ones to take leadership in. There are so many issues in NASW, if you don’t have priorities, you get lost.”

“If I can find volunteers who want to make a contribution to NASW and are passionate about an issue and will staff a coalition, that’s golden,” said Brill.

Susan Christman, media specialist who created and designed the New York State Chapter’s “New Face of Social Work” media campaign, won the Gilman/Wells Distinguished Service Award from the Council of Chapter Executives. The campaign was adopted as the Social Work Month theme by the national office. She also undertook a public service campaign for radio by producing compact discs that were made available to all chapters and received much airtime during Social Work Month. Thomas Tupa of the North Dakota Chapter was selected 2001 Outstanding Chapter Executive by the Council of Chapter Executives.

When Tupa took his part-time job 13 years ago, his small chapter was having financial and structural problems. Within a year, they were fixed, and the chapter has been on sound footing since. Tupa’s chapter was the first to use interactive video network satellite hookups for board and other meetings. His lobbying skills helped North Dakota become the first state to enact a bill to regulate e-therapy.

Carolyn Peters of the Ohio Chapter was recognized for her service as head of the Council of Chapter Presidents. The new chair is Philip Lucas of the Metro Washington Chapter, and the chair-elect is Dorothy McEwen of the Mississippi Chapter.

Robert Schachter of the New York City Chapter was recognized as outgoing chair of the Council of Chapter Executives. The new chair is Sam Hickman of the West Virginia Chapter, and the chair-elect is Rebecca Myers of the Pennsylvania Chapter.

The NASW News is NASW’s primary means of communicating with the membership about association activities and developments in professional practice and social policy. It carries statements of opinion by a variety of spokespersons and, as space permits, letters to the editor. Views do not necessarily represent positions of NASW.

LEGISLATIVE GLOSSARY

Act- A bill that has passed both chambers and has been signed by the President to become law. Often, a bill may have the word “Act” in its title when it is introduced and does not reflect if it has been officially considered.

Amendment- A change to a bill or motion. An amendment is debated and voted on in the same manner as a bill.

Appropriation- A formal approval to draw funds from the United States Treasury for an authorized program or activity.

Authorization- Legislation that formally establishes a program or activity and sets a funding limit for that program or activity.

Bill- A proposed law that is introduced in the legislature by a Member of Congress. In the House a bill is recognized as H.R. and S. in the Senate.

Chamber- A place where the legislative body meets to conduct business. In the U.S. we have two chambers, one each for the House and Senate respectively.

Committee- A group of legislators in the House or Senate that prepares legislation for action for the officiating chamber. Committees often schedule public hearings to discuss legislative issues. Most action takes place at the subcommittee level.

Concurrent Resolution- Legislation adopted by both Chambers to express the position of Congress. As such a resolution does not have the signature of the President; it does not have the force of law.

Congressional Record- The official transcript of House and Senate proceedings.

Conferees/Conference Committee- The House and Senate appoint conferees to a conference committee to resolve differences between House and Senate passed versions of the same legislation. The Senate Majority Leader and the House Majority Leader appoint conferees.

Continuing Resolution- Legislation passed by both the House and the Senate permitting specific Executive Branch agencies to continue operating even though funds have yet to be appropriated for the following fiscal year.

Cosponsor- When a member of the House or Senate supports a pending bill, but is not the primary sponsor, they sign their name onto the bill as a cosponsor to illustrate their support.

Filibuster- Delaying tactic associated with the Senate and used by the Minority in an effort to prevent the passage of a bill or amendment. Usually threatened but not executed. The House cannot filibuster as all debate is governed by rigid rules crafted by the Rules Committee setting the parameters for discussion and approved by the entire body for each separate piece of legislation. The Senate does not employ a rulemaking process.

Hearing- An occasion in which evidence to support particular points of view can be brought forth to the sponsoring Committee.

Joint Committee- Members of both chambers are appointed to consider matters of common interest. Such committees can speed up the legislative process by consolidating the time for hearings.

Mark up-The process of amending a legislative proposal. Held by the Committee of jurisdiction, committee members can offer amendments, which if successful, changes the legislative language of a particular bill. If the bill is changed drastically the committee might reintroduce the legislation under a new bill.

Majority Leader- The leader of the majority party in the Senate, elected by his/her peers. In the House, the Majority Leader is the second in command in the House after the Speaker of the House and is also elected to that post by his/her peers.

Minority Leader- Leader of the minority party in the House and Senate.

Recess- Adjournment by the House or Senate for at least three days, with a set time for reconvening.

Speaker of the House- Elected by the majority party, the Speaker presides over the House of Representatives during the two-year legislative session.

Whip- Senator or Representative who serves as an internal lobbyist for the Republican or Democratic party to persuade legislators to support their party position, and who counts votes for the leadership in advance of floor action.



National Association of Social Workers

**NATIONAL ASSOCIATION
OF SOCIAL WORKERS**

750 First Street, NE • Suite 700

Washington, D.C. 20002-4241

202.408.8600

www.socialworkers.org