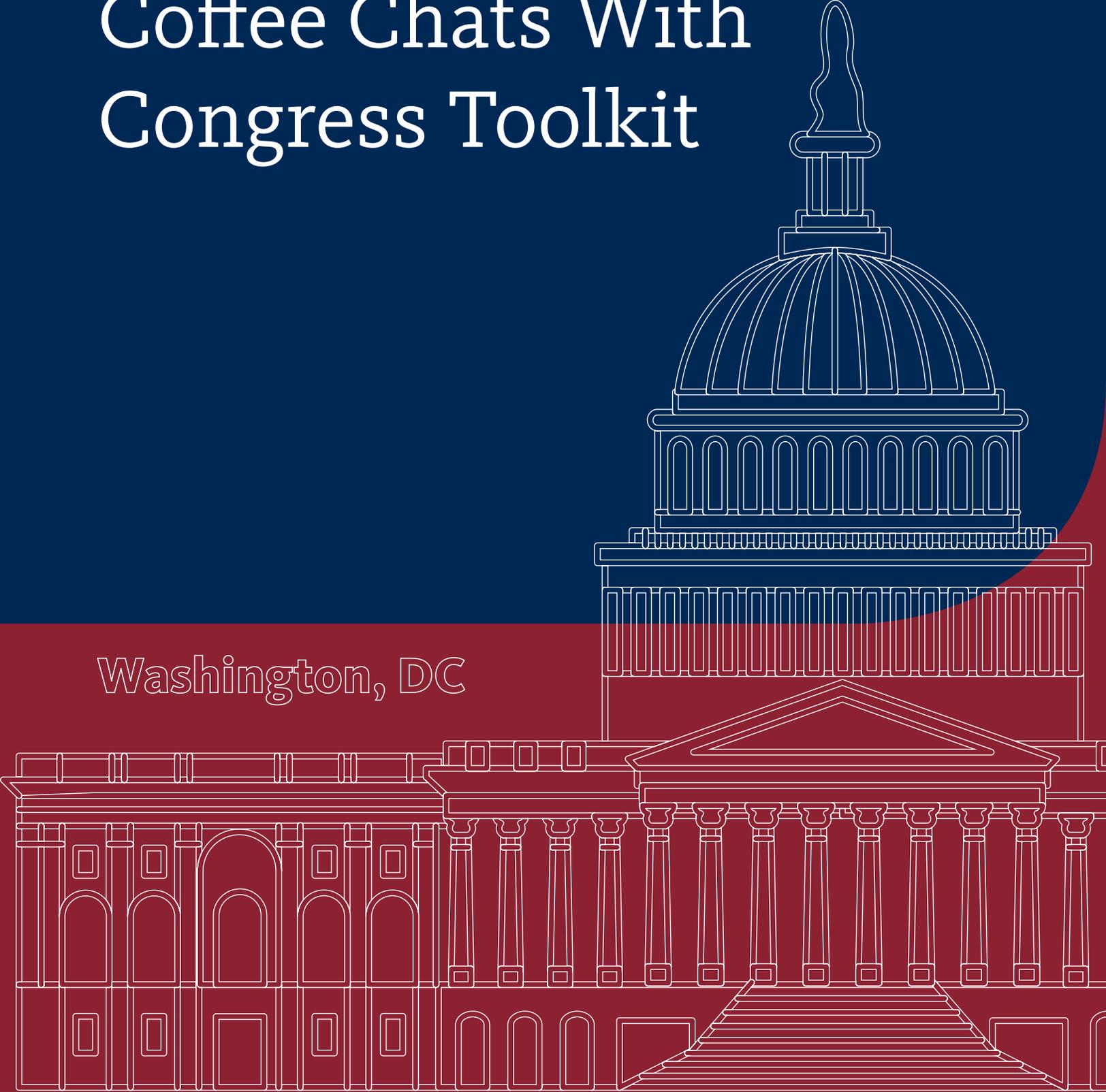
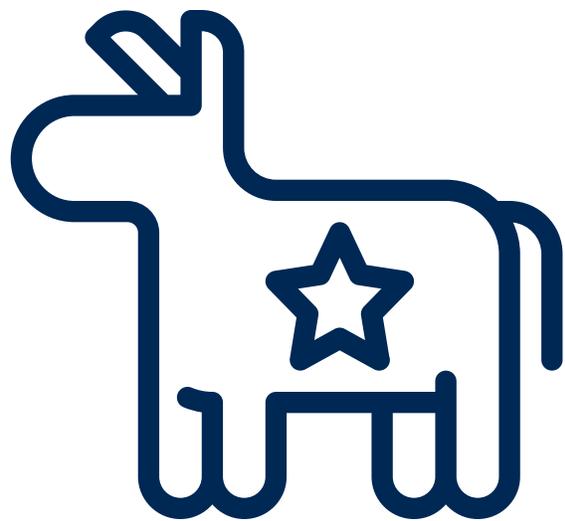
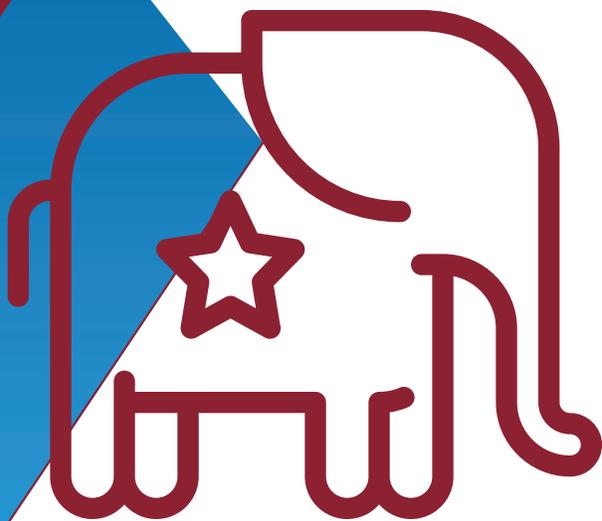


Coffee Chats With Congress Toolkit

Washington, DC





WHY IS LEADINGAGE SETTING UP COFFEE CHATS WITH MEMBERS OF CONGRESS?

A coffee chat is a small meeting with a few LeadingAge staff members, residents, and a member of Congress and their staff. These events will often start with a short tour of your community or facility and allow for the member of Congress to see your community up close and meet the individuals who make your place vibrant and special.

Why are these meetings so important? LeadingAge is the trusted voice for aging and an important part of our mission is to advocate for public policies that remove barriers to care, develop new services, and make this country a better place to grow as older adults.

Our advocacy teams meet regularly with lawmakers to educate them on the policy issues that impact our provider organizations such as affordable senior housing or quality health care programs.



BUT, as terrific as our staff is in Washington, legislators also want to hear from YOU, our members, because you are on the front lines watching how these issues play out day after day in your communities, and how they affect the residents and families you serve.

Every chance you have to sit down with a legislator and talk specifically about issues that affect your organization/community/residents/clients, it's a chance to put a "face" on those issues, to share a story, not just a bunch of statistics. It's also a chance for legislators to see up close the nonprofit difference.

This campaign is asking LeadingAge members to set up conversations with legislators so that you can talk about the good work you're doing and the challenges that your community encounters.

They don't need to be fancy, they don't need to have lots of bells and whistles. We will help you think through the invitation, the location, and the meeting itself. In turn, you will be showcasing the terrific work you do and connecting the dots for the legislator on how decisions made in Washington, DC, affect what happens in your community.

We're excited about increasing our advocacy activities at LeadingAge—we strongly believe that good public policy is critical to our mission. And when you agree to engage in advocacy activities on behalf of the organization, we will partner with you to ensure you have the tools to be effective when you meet with lawmakers. That's why we have developed this toolkit for Coffee Chats with Congress.

THANKS FOR JOINING THIS CAMPAIGN— YOU CAN MAKE A HUGE DIFFERENCE!

WHO SHOULD ORGANIZE THE COFFEE CHATS

Coffee chats can be put together and hosted by anyone with a LeadingAge connection. It is important that the community or facility actually be in the congressional district of the targeted member of Congress. Legislators are much more inclined to meet with constituents.

All legislators have district-based offices and those staff are always looking for opportunities to get members of Congress out in the community. What better place to have a conversation than at a senior housing community, adult day care center, etc.

When you invite a legislator to your community, it provides them a real-life experience and connection to the great services you provide. The best Coffee Chat with Congress events should balance a tour of the community with sit-down time to talk about the real issues your community faces. (Later in this toolkit you can read about how the actual event might proceed.)

If you don't know which member of Congress represents your community, visit www.congress.gov to get that information for your senators and representative.



HOW DO YOU GET A MEMBER OF CONGRESS TO ATTEND YOUR COFFEE CHAT?

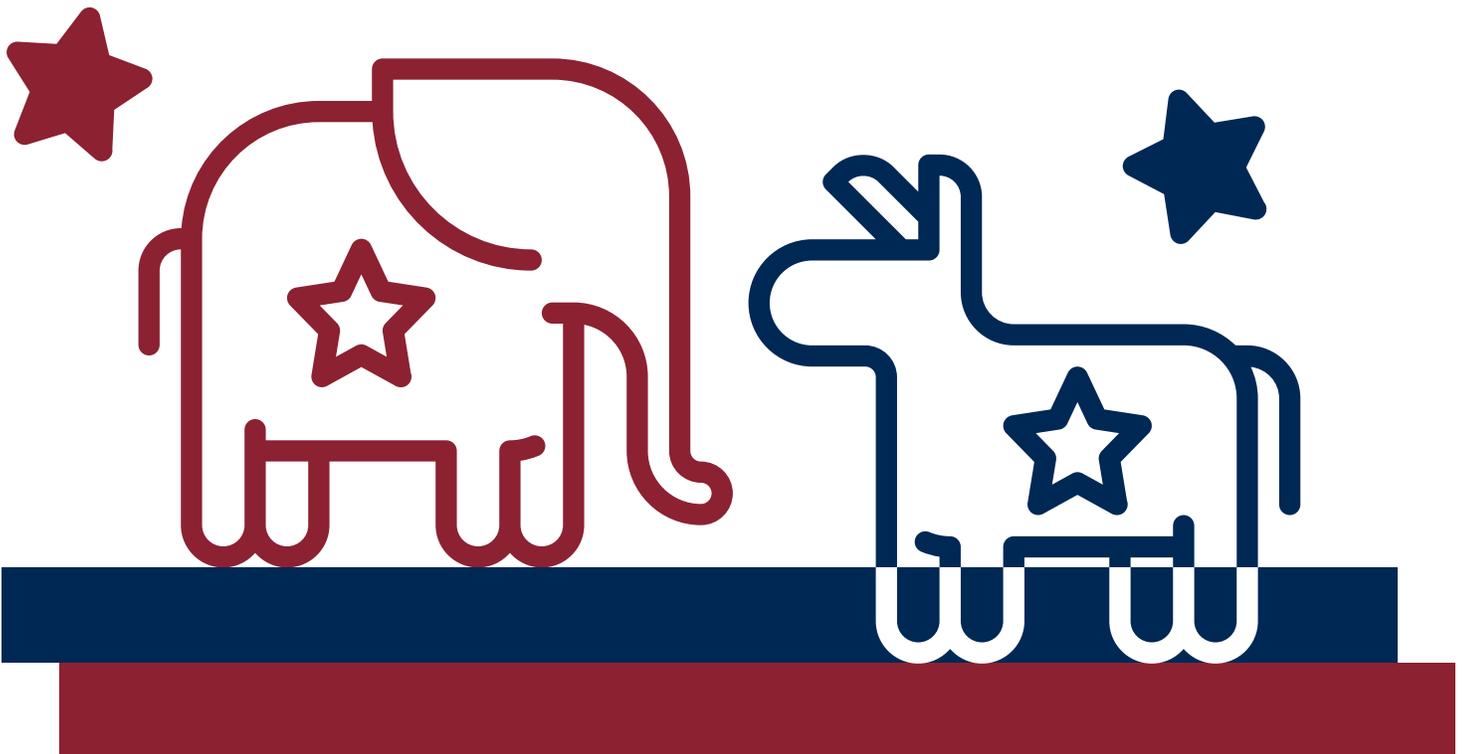
Members of Congress are invited to local community events often, so the district office is used to getting requests.

Call the district/state office directly (phone numbers can be found on the legislator's official website or at www.congress.gov):

- Ask to speak with the scheduler, if you are referred to the DC office, ask for the scheduler's phone number.
- Briefly introduce yourself (name/city/community).
- Clearly state some potential dates for your desired meeting and your interest in having the legislator come to your location for a tour and discussion.
- They may ask what specific issue you want to talk about (more on this when we talk later in the toolkit about the agenda for the meeting).
- Legislators' schedules at home are heavily focused on time with constituents, so it is okay to press the scheduler for a meeting (this is why members of Congress are home from DC).

They may not be able to confirm the appointment immediately so get the contact information and tell them you will continue to check in with them.

You've probably seen all the news coverage about contentious town hall meetings over the last couple of years. The truth is that more members of Congress are looking for smaller, intimate conversations. Coffee Chat with Congress will be very attractive to them.



WHAT WOULD A SAMPLE SCRIPT INVITATION TO THE STAFF OF A MEMBER OF CONGRESS SOUND LIKE?

Hi, I am interested in talking to Congresswoman Smith's scheduler, please. My name is [XXX] and I am staff at the local [affordable housing, nursing home, life plan community, etc.] community. We would really like to host Congresswoman Smith at our location for a tour and a coffee chat.

We know she will be home during much of August—do any of the following dates work? [Give 3 date options.]

Can you give us an idea of how long the visit might last?

Note: The staff person may ask you what issues you want to address with the member of Congress; it's important to work with your staff partners at LeadingAge prior to the actual meeting to determine what two or three issues are most critical to discuss based on what is going on in your community, as well as the specific role your member of Congress may play in Congress (committee representation, leadership role, etc.).

WHO ELSE SHOULD BE IN THE MEETING?

You will most likely only have limited time with the legislator, so it's important to be thoughtful about how to structure the time that he or she is at the community. These events don't come around very often and you want to take full advantage of the opportunity!

Your four main goals for the meeting:

1. Introduce you and your community to the legislator.
2. Connect the issues your community/organization faces with decisions that are being made on Capitol Hill.
3. Make a specific request (or requests) of the legislator.
4. Build a relationship with the member of Congress and his or her staff so that this will be the first of many visits.

We would encourage you to include several others in the meeting:

- Other staff or your state LeadingAge affiliate staff who may know the legislator.
- One or two residents.



The more people involved in the event, the more important it is to think through the agenda, what each person is going to say and who is going to make the request/s of the member of Congress.

How do you develop an agenda for the meeting?

The staff person who helped set up the meeting should have given you a timeframe for the visit (possibly 45 to 60 minutes).

Break that time down on paper into the key elements of the meeting:

- Welcome and introductions.
- Tour of the community.
- The actual coffee chat with the legislator.

Flexibility is the rule of the day. The member of Congress may arrive late and announce that he or she only has 30 minutes. Adjust the schedule in your head accordingly.

Sample agenda:

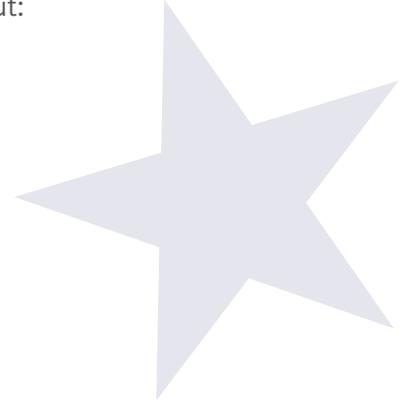
- 1 – 1:10 p.m. - Congresswoman Smith arrives at the organization; Rep. Smith is introduced to George Davis, Mary Jones (head of resident services) and John Beatty (resident)
- 1:10 – 1:30 p.m. – Rep. Smith is given a tour of the community by George, Mary, and John.
- 1:30 – 2 p.m.- Coffee Chat with Congress in the dining hall with Rep. Smith, George, Mary, and John

Remember: Legislators like to talk to everyone they meet as they walk through the community, so greeting time should be built into the schedule.

WHAT HAPPENS DURING THE COFFEE CHAT WITH CONGRESS PART OF THE EVENT?

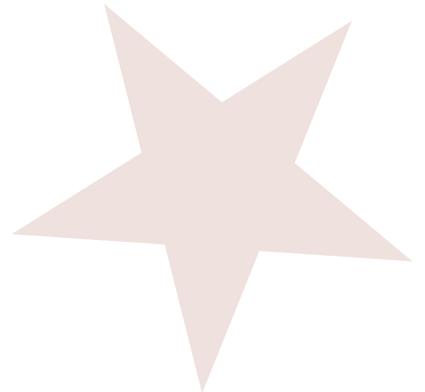
Once the general outlines of the agenda are set, participants can begin to finalize the actual scripts for the meeting, based on who's involved in the tour and coffee chat. The more scripted and prepared participants are, the more effective the event will be, which argues for being very specific about:

- What role each participant will take.
- Who will open the discussion.
- Who will run the meeting and keep it moving along.
- What order people will speak.
- Who will share a story to put a face on the issue for the legislator.
- Which handouts that will be presented to the legislator.
- Who makes the actual requests of the legislator.
- Who wraps up the meeting and talks about next steps.



These intimate meetings with legislators are unique opportunities. It is imperative for participants to be clear on their role/s.

Ideally, there will be a pre-event walk-through so that participants can practice what they are going to say, how they will segue from one topic to another, etc. Also, it is critical that participants reinforce that they are constituents.



THE HEART OF THE MEETING—PARTICIPANT STORIES

It's important to understand why personal stories are so influential with policy makers. All legislators make it a high priority to keep in touch with their constituents. They set aside a substantial amount of time to meet with residents from their district or state. During any given week, they meet with dozens of constituents.

The meetings that make the biggest impression on them are those where the constituent has shared a personal story and explained why the legislation they seek will make a difference to them. These constituents are able to have an impact because they put a face on the issue.

Not surprisingly, these stories are likely to be remembered by legislators far longer than facts and figures.

In the coffee chat, this story might be shared by a resident or by an administrator. The story connects the dots for the legislator: how a particular bill is hurting (or could help) a resident and what the practical impact of the bill is for constituents in that district. Legislators also like to hear that successful legislation they sponsored has made a difference for providers and residents; LeadingAge can help you identify possible opportunities.

As with other elements of the actual Coffee Chat with Congress part of the event, the more time the participant is able to spend thinking through their story and how to talk about it, the more effective it will be when the story is shared as part of the event.

Participants should write down what they plan to say and practice before the event.

Please also plan to take pictures. These are great for social media and later use.



WHAT SHOULD BE THE SPECIFIC REQUEST FOR MY MEETING?

It is important to work closely with your LeadingAge staff partners in DC as you prepare for the Coffee Chat with Congress. It will be very helpful for them to know:

- When it is happening.
- Who will be participating (if anyone) from the member of Congress' staff.
- Who is attending from LeadingAge.

In return, DC staff will be able to provide current insight on specific legislation that should be raised with the legislator, along with critical background information on that legislator's relationship with LeadingAge and aging services issues.

You can download the latest LeadingAge issue briefs at www.leadingage.org/policy-priorities. These one page documents can help with talking points and provide critical background on housing and health policy issues.

LeadingAge works on so many critical issues that it would be easy to come up with a long list of topics to discuss with the member of Congress. But focusing on two or three—especially those that are timely to your community, to the current legislative environment in DC, or are of unique interest to the legislator—will focus the meeting in a more productive way. DC staff will work closely with you to identify those topics.



WHERE SHOULD YOU HOLD THE MEETING?

This toolkit is designed around the premise that the event will be held at a life plan community, affordable housing complex, or care organization connected to a LeadingAge member. This is ideal because the member of Congress gets to see the work of the community and facility firsthand.

If the legislator is unable to come to your building, you can meet at a coffee shop or at the legislative office, adjust the agenda, but still use the scripts and legislative requests as laid out earlier.



IS THERE ANYONE I CAN CALL AT LEADINGAGE FOR HELP?

Yes! LeadingAge staff are very aware that the power of the organization comes from members in the field-- your connections, your stories and your day-to-day experiences that are so impacted by decisions that get made in DC. Your willingness to meet with your member of Congress will make an enormous difference in the organization's advocacy efforts.

Joe Franco, vice president of grassroots, is your main point of contact for your coffee chat and he will coordinate with other LeadingAge staff. When you have scheduled your event, let him know by contacting him at: jfranco@LeadingAge.org or 202-508-9442

LeadingAge is ready to help support you with:

- Whether it makes sense to invite a particular legislator to participate in a coffee chat.
- How to identify key stories to share with the legislator.
- How to think through the flow of the meeting.
- How to make the invitation over the phone.
- Who to include in the event from the organization.
- How to structure the agenda.
- The request/s you make of the member of Congress.

Use this toolkit to plan your Coffee Chat with Congress, but reach out to your staff partners as the event starts to take shape. Your LeadingAge staff partners will give you the latest information on where that legislator stands on a particular issue.

Once the event is complete, share with LeadingAge the nature of the conversation, any commitments that were made during the meeting, any follow-up items you—or they—have connected to the meeting, and general impressions of the new relationship. They meet with these same congressional offices in DC, so the better they understand what happened at your event, the easier it is for them to build on it.

We have created an easy form to help track your advocacy activities. Please fill out our form at www.leadingage.org/grassrootsform.

IS THERE ANY FOLLOW-UP I NEED TO DO AFTER THE EVENT?

The short answer, yes. Many great legislative meetings and events end up falling short of their full potential because participants treat them as a one-off activity and never do anything to follow up.

LeadingAge is committed to engaging in a year-long calendar of activities. These Coffee Chats with Congress will be followed by additional advocacy events, all with the goal of building relationships (and putting pressure on) legislators. Throughout the year, we will be asking you to continue to meet with your member of Congress (or email, call, attend community events, etc.).

That's why it's important that the coffee chat be followed up immediately with a thank-you email from participants to the legislator (and staff who helped arrange it), a summary of the discussion, and a pledge to keep in touch with the member of Congress.

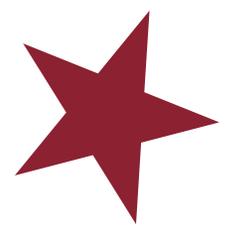
We encourage you to share the event and pictures on social media. Remember to tag the member of Congress in the post/tweet, legislators and their staff track mentions and engagement from social media sites. While you may not receive a direct response from their account, the posts/tweets are having an impact.

Lastly, you should write a letter to the editor or opinion editorial to your local media highlighting the positive experience, thanking the legislator for their attendance, and sharing any messages of support that came out of the event.

Make sure to also let us know how the meeting went at www.leadingage.org/grassrootsform. This will provide valuable information to our lobbyists in DC and let us know what follow up we can do to help you and your congressional office.



NOTES





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