



# Best Life ALLIANCE

## Site Visit Toolkit

### Contents

Sample Timeline.....	2
Best Life Alliance Messages .....	5
How to Share Your Story.....	6
Site Visits and the Law .....	7
Sample Invitation .....	8
Sample Press Release.....	9
Site Visit Checklist .....	10

# Program Site Visits: A Sample Timeline

## One month ahead

**Choose the site.** Choose the site you would like your legislator to visit; this site should fall within their district. You can find out who represents your site by entering the address here: <http://www.gis.leg.mn/iMaps/districts/>.

**Identify goals for the visit: The Best Life Alliance encourages you to use this visit to establish a relationship with your legislator, or to strengthen an existing connection.** Specifically, we hope that the visit will achieve three main objectives:

- Help the legislator see what community-based disability services look like.
- Educate the legislator about the specific components that constitute the important work you do.
- Provide the legislator an opportunity to think about the question: *If I were a person with a disability accessing community-based services, or a staff person providing these community-based services, what is working well and what improvements would I like to see happen?*

## Invite your legislator(s)

- Ideally, your legislator should receive an invitation one month before the event. Emailing an invitation with some specific dates/times in mind can get the ball rolling. Be sure to ask specifically for an RSVP.
- Prepare to be flexible. Often a legislator or their Legislative Assistant will give you a date/time that works for them. **Be persistent;** sometimes, it takes many calls or emails to nail down a date.
- Make a personal follow-up call to the legislator or their Legislative Assistant two weeks before the event to confirm the visit.
- If you already have a picnic or similar event planned, you may want to invite your legislator to that. It's easy for you and they often like the idea of meeting more constituents.
- Invite the legislator to visit your home, site where employment supports are provided, or other service site at a more "typical" time when clients are present; meeting the people we serve has the greatest impact on legislators.

## Two weeks ahead

**Identify roles.** Based on your goals, make a list of how many people you will need to help and what their role will be. For example, think about who will greet the legislator, give them a tour, and introduce them to other advocates. Identify a leader. They'll be the main speaker and point person throughout your meeting. Also be aware of the size of group that will be appropriate for the setting you'll be in. You don't want to overwhelm the legislator, the people you serve, or your employees. Train them on their role and answer any questions that they have.

**Get supporting material.** You can use information from The Best Life Alliance or create your own to educate people about the value of the services your organization provides to people with disabilities.

**Review rules for non-profits and legislator visits.** Your visit should be comfortable for everyone and fairly low-key. There are some things the law says you can't do: see page 7 for more information.

**Know your audience.** Try to know what committees your Senator or Representative sits on, and if possible, which way he or she has voted on your issues.

## Day of the visit

**Show time!** Have a great time at the visit and be sure to thank people for participating. Take note of the people you connected with or recruited so that you can invite them to participate in other grassroots advocacy activities in the future.

- **Identify why you are visiting your legislator.** This should primarily be a visit to establish a new relationship or solidify an existing one. Explain who you are, what you do, the impact of your programs and services on the community, and how recent legislation has affected you. Let them know if other government leaders and key interest groups share your position.
- **Make a personal connection.** Acknowledge your legislator's professional and personal achievements and discuss common interest.
- **Be true.** If you don't know the answer to a question, don't make something up. Don't embellish data to support your point. It's perfectly fine to tell a legislator you don't know the answer to their specific question, but that you will get in touch with your government relations resources and get back to them (and don't hesitate to reach out to Best Life Alliance leaders to assist with this follow up).
- **The "ask:"** Ask the legislator to prioritize services for people with disabilities in 2018!

- **Be a resource.** At the end of your meeting with a legislator, ask what you can do for them to help them meet their legislative objectives.
- **Take a photo of your legislator.** Include staff, family members or people served. Send a photo to your local media afterwards.

## Within two weeks afterwards

**Thank you! Thank you! Thank you!** Thank your staff, families and people served for giving your time, resources, talent, effort, and connections to strengthen The Best Life Alliance's grassroots advocacy efforts and build meaningful relationships with your decision-makers on behalf of the issues we care about.

**Follow up.** Send a thank you email or letter to your legislator and photos from the event.

**Submit the photos to your local media** with a news release or caption for the photo (see sample template on page 9). If there were any questions you couldn't answer in your meeting, follow-up with solid responses (again, don't hesitate to reach out the Best Life Alliance leadership to help with this follow up).

**Evaluate and share.** Talk with your staff after the event. Take time to reflect on what went well, what your successes were and what you accomplished. Identify what you learned along the way and what you would do differently next time. Share these results with the Best Life Alliance. Contact Sara Grafstrom at [sgrafstrom@arm.org](mailto:sgrafstrom@arm.org).

# Best Life Alliance's Messages

## Suggested Messaging Ideas for Best Life Alliance Supporters to Use in Grassroots Tours/Communications with Legislators

- There were a number of important and beneficial longer-term policy reforms and funding increases for community-based disability services passed during the 2017 legislative session. Best Life Alliance is grateful for the many legislators who worked hard to ensure the passage of these reforms that will, over the long-term, strengthen community-based disability services in Minnesota.
- An immediate wage increase for community-based disability services direct care workers was not passed during the 2017 legislative session, and the workforce crisis we are facing continues on. Right now the foundation of a strong community-based disability services system - a strong and stable direct care workforce - is crumbling away.
- While stakeholders are working hard to innovate and reform service delivery as much as possible, these efforts are greatly hampered when people with disabilities and providers cannot hire the staff they need, there is a huge strain on overworked direct care staff, and providers struggle to recruit, train, retain and operate with high turnover rates.
- Best Life Alliance is eager to work with policymakers during the 2018 legislative session to prioritize community-based disability services. We will be bringing forward legislation advancing reforms to help address the workforce crisis and stabilize the community-based disability services system so that Minnesotans accessing and providing these services can live their best lives.

# How to Share Your Story

## Providers and Staff:

- **Talk about open shifts, challenges in competing with other local businesses for workers, or how high turnover affects quality of care.** [Open shifts and high turnover make it difficult to do anything more than the basic cares. Quality care depends on consistent, quality staff. It's difficult to move forward with reforms if so much time and energy has to be spent trying to fill shifts and train in new staff over and over.]
- **Share creative, new ways services are meeting the changing needs of people served, staff or your organization.** [How are you using technology, creating new efficiencies, improving health outcomes, creating new opportunities for people with disabilities?]

## Caregivers or Direct Support Professionals:

- **Talk about yourself.** [Specifically, include the work and tasks you do every day, how long you have been in your current position and struggles you face due to the wages you earn].
- **Talk about the specific services** that support people with disabilities and older adults and what impact they have. [They increase independence, allow people to be active participants in their communities, ensure health and safety, foster skill development, provide job coaching, meet medical needs, allow people to volunteer, etc.]

## Family Members:

- **Talk about your loved one** and the specific services they receive. [Share how the services impact your loved one's life, as well as your own.]
- **Talk about open shifts, and staff turnover,** and how high staff turnover impacts your loved one's life, as well as your own. [Open shifts and high turnover make it difficult to do anything more than the basic care. Quality care depends on consistent, quality staff.]

## Self-Advocates:

- **Talk about yourself** and the specific services that you receive.

**Talk about the impact staff turnover has your day-to-day activities.** What does it feel like to have old staff leave and new staff working with you? How is your care affected?

# Legislator Site Visits and the Law

Your visit should be comfortable for everyone and fairly low-key. If you are a non-profit, there are some things the law says you can't do. Here are some basics:

- You must take steps to ensure that you indicate no support or opposition to the candidate or legislator at the event.
- No political fundraising should occur at the event.
- 501(c)(3)s are allowed to try to persuade candidates or legislators to agree with them on issues and to take a public stand, but that is as far as you may go. You may not ask the candidate or legislator to sign a pledge of support for your position on those issues; such action would imply that you favor candidates or legislators who make the pledge.

More lobbying guidelines are available on the web at [www.clpi.org/faq.aspx](http://www.clpi.org/faq.aspx).

# Sample Site Visit Invitation

The Honorable John Doe  
The Honorable Jane Doe  
Minnesota Senate/Minnesota House of Representatives  
Address  
City, State, Zip

Dear [Representative Doe or Senator Doe]:

You represent a district that includes [type of program site] managed by [agency name]. We serve [number] of people, and employ [number] staff. I am writing to invite you to visit our [program site] on [time and date], which will provide you with an excellent opportunity to hear from your constituents affected by developmental disabilities, traumatic brain injuries, autism, mental illness and other disabilities.

Here in Minnesota, we have a lot to be proud of in terms of our community-based disability services system. However as you are aware, we are currently facing an extreme workforce crisis. Due to low wages, more than 8,700 unfilled caregiver and staff jobs exist in Minnesota today. People with disabilities and providers cannot hire the staff they need. There is a huge strain on overworked direct care staff, and providers are struggling to recruit, train, retain and operate with high turnover rates. We would like to take this opportunity to share our ideas with you on how we can work together to be a part of the solution and improve this situation.

At this visit, you will have the chance to meet consumers of services and their families who will share with you their personal experiences attempting to achieve greater independence. You will also meet staff who will convey to you their daily struggles to ensure that they are making the most effective use of limited resources.

During this visit, we welcome your comments on disability issues and how we can assist you as you work to represent our interests.

I will follow up with a call to your office next week to learn of your availability. In the meantime, if you have any questions, please do not hesitate to contact me. Thank you for your consideration of this invitation.

Sincerely,  
[Name, title]

# Sample News Release

FOR IMMEDIATE RELEASE: [Date]

MEDIA CONTACT: [name, title, phone, email]

## **Rep./Sen. [insert name] visits [name of town and type of service] for people with disabilities**

[TOWN] --This [month], [agency name] in [town name] invited [local legislator's name] to visit [name of site or program]. They wanted to demonstrate the value of programs that serve people with disabilities in this community, and to remind legislators that adequate funding for services is critical to further the quality of life, health and safety of Minnesotans with disabilities.

"Quote here from you about the value of your services -- to your agency, programs and staff". Also, if there have been cuts, describe the impacts.

Insert here what legislators were treated to, such as tours and the opportunity to meet the individuals receiving services and their families.

[Agency name] is one of thousands of agencies around the state serving Minnesotans with disabilities through a variety of residential and employment programs. These services allow people to live at home with their families or in another residential setting, and to work in their local communities.

Insert a "boilerplate" here: a blurb here about your agency, when it was established, how many individuals you serve and what types of services you offer, and your website link.

**Note: If you take photos of the legislators visiting your site, and completed the Best Life Alliance release, please send those to us and identify everyone in the photo. Be sure to get photo releases from the people you serve/their guardian if they appear in photos. Once the photo/article appears in your paper, please send a copy to Best Life Alliance by emailing Sara Grafstrom at [sgrafstrom@arrm.org](mailto:sgrafstrom@arrm.org). Thanks!**

# Site Visit Checklist

## Four weeks ahead

- Choose the site.
- Identify/ Review goals for the visit (Best Life Alliance suggested broad and specific goals can be found on page 2 of this document).
- Invite your legislator one month in advance. Email them with specific date/times and ask for an RSVP. Is there an existing event the legislator can attend, like a picnic or similar event? Be sure they meet the people you serve.
- Follow up with the legislative assistant or legislator before the visit to get a confirmation.

## Two weeks ahead

- Identify roles. Who will be present at the site visit, what will their roles be (i.e., who is the leader, what route will you take on your tour, who will you talk with during the visit)?
- Get supporting material (tips for messaging and how to share your story can be found on page 5 and 6 of this tool kit, Best Life Alliance has additional resources for this if you would like) and prepare for the meeting by reviewing your messages, learning more about your legislator, etc.
- Review rules for non-profits and legislator visits.
- Know your audience. Learn more about what committees your legislator sits on and what their personal interests are.

## Day of visit

- Have a great time and thank people for participating.
- Take photos.

## Within two weeks afterwards

- Thank your staff, family and people served for their time and effort.
- Send a thank-you card or email to your legislator and photos from the event.
- Contact press with information about the visit.
- Evaluate your experiences and share them with The Best Life Alliance