

CAL CHIRO

GRASSROOTS/KEY DOCTOR TRAINING GUIDE

WHAT IS GRASSROOTS ADVOCACY?

For the California Chiropractic Association (CalChiro) to influence policy, members must mobilize on a local level, called grassroots advocacy. Government has a dramatic effect on chiropractors in practice as **chiropractic in California is a legislated profession**. Luckily, we have the power to shape government action. This power stems from an ability to influence decisions of policymakers and regulatory officials. In a climate of expanding coverage, increasing barriers to access and delivery, cost concerns and opioid addiction, chiropractors have **considerable impact**, even more as an active leader in the community. Your personal and professional connections are key. Most professionals have embraced state and local political activity as part of their culture - California chiropractors must do the same. CalChiro efforts are most successful if its strategy is widely embraced, well-coordinated and efficient. This guide provides tools to advocate for the chiropractic profession and to affect good policy. It contains practical steps for grassroots action in your community and ways to advance chiropractic, and in turn, patient care. It details steps to **make a difference for your practice, patients and CalChiro**.



CALCHIRO'S GOVERNMENT AFFAIRS TEAM & KEY DOCTOR PROGRAM

CalChiro's Government Affairs Team - CalChiro's Executive Vice President & CEO, The Weideman Group lobbying team, Political Action Committee Board of Trustees, Government Affairs Committee and Key Doctors are all integral parts of CalChiro's government affairs team. Each legislative session, CalChiro's Government Affairs team carries out a legislative plan, approved by CalChiro's Board of Directors, which includes positions on policy of importance to chiropractic. The team is responsible for weighing in on public support or opposition for designated bills as well as communications, calls for action and advocacy resources for members. **The entire Government Affairs team is eager to help you be successful as a Key Doctor.**

CalChiro's Key Doctor Program - This grassroots program is a central component of CalChiro and designed to educate the Legislature about the chiropractic profession, establish and maintain positive relationships with stakeholders, and collaborate with the Government Affairs team and District Presidents on advocacy issues. Key Doctors are liaisons between legislators, CalChiro staff and local district presidents. The Government Affairs Committee appoints and oversees Key Doctors. The goal of the program is to have at least one doctor of chiropractic per legislator. We will help guide you, but it is your efforts and the relationships you develop that will lead the way in delivering the chiropractic message. When your legislator considers his/her position on our issues, you are the person they will think about.

KEY DOCTOR QUALITIES

- **Be Articulate.** Communicate clearly with your legislator. Speak intelligently, credibly and accurately on a subject. Convey complex legislative or regulatory issues in an informed, engaged and professional manner. Review and practice talking points provided by CalChiro before meeting with legislators.

- **Be Responsive.** You will be communicated with often regarding meetings with policymakers, opinion editorial opportunities, local fundraising events and general advocacy. Complete tasks in a timely way and report outcomes to CalChiro's Executive Vice President & CEO.
- **Be Focused.** Refrain from discussing non-chiropractic issues (Ex: immigration, gun control, abortion). Key Doctors possess the temperament and discipline to stay on point; if led off point, they have the presence of mind, tact and diplomacy to refocus and stay focused on chiropractic messages.
- **Be Committed.** Be committed to the short and long term goals of CalChiro's legislative plan. Understand your efforts advance the chiropractic profession.
- **Be Reasonable.** Understand that grassroots advocacy can be a long process. Do not take legislative losses personally, yet use these opportunities to refine your efforts.
- **Be Mindful.** You are the "face" of chiropractic and represent both the concerns of your esteemed colleagues and the legislative intent of CalChiro.

HOW TO GET STARTED

Become knowledgeable about issues affecting your profession. The more you know about chiropractic and healthcare, the more effective you will be as an advocate for your profession. Know key issues that affect your ability to practice such as scope, licensure, workers' compensation and healthcare reform. Know about the economy and business issues such as minimum wage and overtime, local population growth/loss, and tax issues critical to your success as a professional. Understand broad implications of issues important to you. Articulate benefits for consumers or the public rather than speaking of issues only in terms of self-interest. Detailed below, you will learn how to become a Key Doctor. CalChiro will provide advocacy resources such as a training video, talking points and legislative tools.



1. **Establish and maintain positive relationships with policymakers.** Meet regularly with district legislators and regulators. Be pro-active - they want to know you, but won't unless you take the initiative.
2. **Keep in touch throughout the year - not just when you need them.** You can't build influence overnight. It takes months, even years. Send a quick congratulatory note when the official wins an election or award. Forward favorable news with a note: *I wanted to make sure you saw this. Nice job!*
3. **Sign up for regular communications.** Go to your legislator websites and subscribe to e-news.
4. **Attend local events.** Legislators hold free local events for constituents. This is a great opportunity for face-time and to show your support.
5. **Get involved in the campaign.** If you support a legislator or candidate, volunteer for campaign activities such as precinct-walking, telephone banking or donating to the campaign.
6. **Stay informed and share.** CalChiro provides regular legislative updates and alerts to members. Check The Weekly Adjustment and other communications for up-to-date issues. Provide pertinent legislative information to legislators. Be able to articulate them to stakeholders.
7. **Write a letter-to-the-editor of the local newspaper.** This is a good forum for spreading the word on chiropractic issues, especially if you demonstrate personal impact. Legislators and their staff scour this section to gauge public opinion. Consider this method to show support of your legislator's policy. Send a copy to your legislator. They WILL take notice.
8. **Become a member of the organizations that your local elected officials tend to join - like rotary and chamber of commerce.**
9. **Become a member of the legislative committee for your local chamber of commerce.** This will give you exposure to state and local legislators and an opportunity to learn about the legislative process.
10. **Seek appointment to state and local health-related boards and commissions.**
11. **Get to know leaders with a common cause.** Other healthcare associations often take positions on legislative issues that could affect you.

12. **Have a long term impact in your community.** Be active in your neighborhood and in family-oriented organizations. You probably have influence there already, although you may not be aware of it. Like you, elected officials, public opinion leaders and key staff and their families are active in their communities, have children attending your local schools, coach sports, and are interested in local Neighborhood Watch Programs. Leverage the important efforts you are already doing or are interested in doing to enlist assistance of others in delivering the chiropractic message to the community.
13. **A good relationship with an elected leader may be as close as your exam table.** Some of your patients (or their families) may be public officials or have relationships with them. Ask!
14. **Make presentations at community forums.** Many organizations (Chamber of Commerce, Kiwanis Club, League of Women Voters, Lions Club, Rotary Club, Soroptimist Club, American Business Women's Association, National Association of Women Business Owners, etc.) accept speakers at their events. This is an opportunity to present chiropractic perspectives on wellbeing.
15. **Keep your district in the loop.** Coordinate with other district Key Doctors when approaching legislators, inform your local District President of updates and provide information to district members.
16. **Coordinate with CalChiro.** Inform CalChiro's Executive Vice President & CEO of district legislator issues or developments and any relevant local politics.
17. **Assist local CalChiro district in endorsing candidates.** Coordinate with CalChiro's Executive Vice President & CEO in interviewing candidates for Assembly or Senate for possible district endorsement. Support chiropractic-friendly candidates and establish a local connection should the candidate win.
18. **Support candidates favorable to chiropractic, especially those endorsed by the district.** Consider organizing a district-sponsored fundraiser for the candidate. Forge ties with potential officeholders.
19. **Review sources of information in your community.** Local and regional news, issue and candidate forums, and online information services can provide important information. Share with CalChiro!
20. **Attend CalChiro's Annual Legislative Day in Sacramento.** As you grow your relationship with your legislator, he/she and their staff will expect to see you for our legislative day - they value the time and expense it takes for you to attend. Demonstrate your depth of commitment at the Capitol, in addition to your local efforts. You will lead a short advocacy meeting, along with other doctors and students, and display best practices. This is one of the most important responsibilities of being a Key Doctor.



TIPS FOR MEETING WITH YOUR LEGISLATOR

Talking to elected officials and their staff shouldn't be an ordeal, difficult or complicated. They are human – just like you. Your meeting is to **provide information** to help meet constituent needs. Legislators need your vote and they are responsive to your concerns. **Here are a few tips:**

- **Schedule meetings with your legislator in his/her district office on a Thursday afternoon or Friday.** Legislators have schedules that keep them in Sacramento Monday-Thursday. The California Legislature session is January-September.
- **Be patient.** Staff may need to check with the legislator before scheduling an appointment.
- **Be open to talking to staff.** Request to see the legislator, but if that's not possible, meet with staff. They often have great influence.
- **Be prepared.** Review the leave-behind materials and talking points prior to your meeting. Know where your legislator stands on key issues and anticipate his/her questions.
- **Provide leave-behind materials.** This is a great resource for legislators and their staff as they determine how to vote on an issue. CalChiro will provide these materials.
- **Personalize your arguments.** Be specific about how legislation impacts you and others.
- **Be accurate and factual.** If you don't know the answer, say you don't know – but commit to finding the answer and following up. Credibility and follow through will help you build trust.

- **Be concise, focused and emphatic.** Summarize your message in a couple of sentences. Let opponents raise their own arguments - don't do it for them. But be prepared to address opposition if asked.
- **Listen.** Take time to listen to what he/she is saying – you may learn something that will help later.
- **Be cooperative.** Comply with reasonable requests, especially for info.
- **Be understanding.** If you understand their problems and attitudes, you'll be more successful in getting them to understand yours.
- **Send a follow-up letter.** Thank **the legislator and staff** for meeting with you, summarize main points you raised and answer any questions.

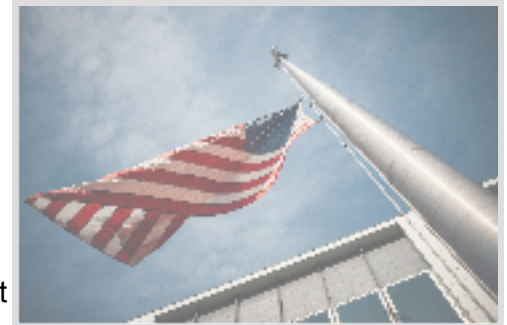


ELECTION TIME - CANDIDATE ENDORSEMENT PROCESS

An essential role for Key Doctors is to ensure incumbent legislators and candidates running for state Senate and Assembly view chiropractors as a political force in their community. General elections happen every two years. For each legislative seat, CalChiro seeks to have an endorsement for the candidate that will serve the profession. CalChiro will provide endorsement recommendations to CalChiro district leadership to engage further in any campaign efforts. Working with their local CalChiro district leaders, Key Doctors can interview candidates in their area and provide their recommendation to local leadership on how to engage further. From there, a local district meeting can take place for district members to approve. **Here is how it works:**

1. **Coordinate with CalChiro.** CalChiro will provide Key Doctors and district leaders with candidates running in each CalChiro district. CalChiro will share its recommended endorsement position and any tips about the race.
2. **Request an interview with each candidate.** The candidate must be interviewed before endorsement. Interviews are often done at a district meeting or in the candidate's campaign office.
3. **Provide the candidate with interview questions.** You can either provide these questions via email before the interview or ask these questions during the interview:
 - What are the primary issues that have caused you to seek election to this office?
 - Where does health care rank as an issue for you?
 - What goals do you have, if any, for making policy and law in the health care area?
 - What are your thoughts about the Affordable Care Act?
 - Would you support the inclusion of doctors of chiropractic as a category of provider and inclusion as a practitioner in the current definition of Essential Health Benefits?
 - Would you support allowing chiropractors to practice to the full extent of their scope of practice through the ACA, and Covered California?
 - Do you support an insured or enrollee's right to select the health care provider type of their choice; specifically, for a chiropractic provider?
 - Do you support the injured worker's right to seek and receive medically necessary chiropractic care on the same terms and conditions as other medical care?
 - Do you support the inclusion of doctors of chiropractic to provide services within their scope of practice that are currently covered when provided by other health care practitioners?
 - What is your personal experience with chiropractic?
 - Have you, or your family members, ever been treated by a doctor of chiropractic?
 - Are you aware of the training and education of doctors of chiropractic?
 - Should you become elected, will you seek the advice of your constituent chiropractic doctors and the California Chiropractic Association (CalChiro), when deliberating health care issues?
 - Would you include a doctor of chiropractic in discussions related to health care legislative and regulatory policy within California?

- Would you include doctors of chiropractic in your citizens' advisory group on health care policy?
 - Would you advocate for the inclusion of doctors of chiropractic to be included as health care policy decision-makers to all task forces, committees and consultants?
 - Is there anything else you would like to share with us about your campaign or your goals as an elected official?
4. **Explain the process to the candidate.** (Ex: We are interviewing each candidate for this seat. We will get back to you with our decision shortly. District leaders will vote on the endorsement considering interview information. If we choose to endorse, we will announce the endorsement to chiropractors in the district. We will submit the endorsement to CalChiro's Political Action Committee Board of Trustees which often financially supports CalChiro district endorsed candidates.)
 5. **Do not promise a financial contribution.**
 6. **Educate the candidate about CalChiro and our most important issues.** (Ex: CalChiro is a membership association with over 2000 members. We are focused on patient safety, access, cost savings, non-drug therapy and health outcomes.)
 7. **Don't talk about specific bills or proposals.**
 8. **Ask the candidate how the race is going and why the candidate thinks they will win.**
 9. **Express gratitude for his/her time.**
 10. **After the interview, communicate with CalChiro.** Contact CalChiro's Executive Vice President & CEO regarding the candidate interview and how the candidate responded to your questions.
 11. **Vote.** At the next district meeting, the district should vote on any candidate endorsements. Inform CalChiro's Executive Vice President & CEO regarding the endorsement vote outcome.
 12. **Follow up.** Contact any endorsed candidate, inform her/him of a decision and provide a formal letter (see CalChiro for a sample letter). Send a letter/email to any candidates you interviewed but did not endorse to indicate your decision and express gratitude for their time.
 13. **Once an endorsement is secured, the work has just begun.** Maintain contact and support their efforts. This can include making in-kind donations such as volunteering with the campaign, providing office supplies and buying food for campaign workers, etc. District members may donate to the candidate's campaign, attend candidate fundraising events or hold a fundraiser for the candidate.



GREENLIGHT: WE FINANCIALLY SUPPORT YOUR CANDIDATE OR LEGISLATOR

Each year, CalChiro's Political Action Committee (CCA-PAC) Board of Trustees allocate funds to influential legislators/candidates. To make these donations most meaningful, we encourage Key Doctors to deliver checks personally. This furthers relationships and promotes good will. **Here's how it works:**

STEP 1 CalChiro staff will contact Key Doctors with **funds allocated** by the CCA-PAC for his/her legislator.

STEP 2 Once contacted by CalChiro, **make an appointment** with your legislator. Call the legislator's district office and ask to speak with the scheduler. Tell the scheduler you'd like to set up a meeting with the legislator to provide a donation from CalChiro. Meeting over a cup of coffee or a meal at a location of the legislator's preference is ideal. You may be told the legislator does not accept donations personally. If so, ask who you should contact to find out when the legislator's next fundraising event will take place.

STEP 3 Email CalChiro's Executive Vice President & CEO at CalChiro with the details, including date and appointment time...or the next fundraising event information. Please make requests at least two weeks in advance.

STEP 4 Meet with your legislator. Tell them CalChiro is happy to support them. Make small talk - NOT policy talk. (Ex: *Are you enjoying the break from the legislative session? Have you had a chance to take some time off? Where did you take your family for vacation?*) Talk about your profession and interests. At the

end of your meeting, thank the legislator for his/her time and explain you'll be calling his/her scheduler to set up a followup meeting in her/his office to discuss some policy issues.

STEP 5 Take a photo with your legislator. Let your legislator know CalChiro will only use the photo to promote grassroots activity.

STEP 6 Summarize your meeting and send it to CalChiro's Executive Vice President & CEO (along with the photo) for inclusion in CalChiro publications.