



ELECTED OFFICIALS OUTREACH INFORMATION KIT



*To ignite a Fair Health Movement that gives people of color
the inalienable right to equal opportunity for healthy lives.*

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PREFACE

This Elected Officials Outreach Tool Kit is intended for use by *PLACE MATTERS* Teams as a means of providing useful basic information to elected officials. The language is specific to the overall initiative and should be used by all teams to describe the National *PLACE MATTERS* Initiative. This kit does not provide language for individual team initiatives as teams have different focuses that require additional customized language. Teams may request assistance with team-specific language from *PLACE MATTERS* consultants by contacting Carla Gullatt at cgullat@jointcenter.org.

As teams inform their elected officials about *PLACE MATTERS*, it is important to note that these officials may participate in many of the national associations that are partners in the Health Policy Institute programs:

- Congressional Black Caucus
- National Association of Counties
- National Association of County and City Health Officials
- National Association of Latino Elected Officials
- National Organization of Black County Officials
- National Policy Alliance

Please use the contents of this kit to assist your efforts to inform elected officials about *PLACE MATTERS* and social determinants of health. Outreach is most effective, when a member of the team is already close to an elected official. When no team member has a direct relationship with an elected or an appointed official, efforts must be made to establish such relationships. This toolkit helps to suggest step by step activities for that outreach, which should always include several written materials in the form of leave-behinds or follow-ups, such as letters, one-page descriptions, PowerPoint presentations, invitation to events or briefings, etc. Most of all use this kit to ensure that the team has contacted as many elected officials that represent the community as possible.

Continue to spread the word about why *PLACE MATTERS*, and why this initiative is so important to our collective good health.

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Remember This About Elected Officials

Background

- They are regular people working in a busy environment. They have to make many decisions with limited information.
- They need your expertise to do their job better—to be knowledgeable, to help their constituents who need services, to do the right thing—and ultimately, they need votes to be re-elected.

Responsibilities

- They represent everyone in their district—registered voter or not, citizen or not. This includes organizations in their district and organizations that serve their constituents
- They speak and vote on complex issues in a way that represents their beliefs and serves their constituents
- They build alliances with other legislators
- They get re-elected and acquire leadership/seniority roles

Remember This About You

- You should make informed votes and work to get the best people in office
- It is your right to call your local, state and federal elected officials
- It is your right to request a meeting in her/his office
- You can send letters of request, concern, thanks
- You can ask to speak at a public hearing
- You can talk to others about voting and calling on elected officials
- You can keep them up-to-date about *PLACE MATTERS*

STEP-BY-STEP CONNECTIONS TO ELECTED OFFICIALS

THE OVERVIEW

Step One

When reaching out to elected officials in your area, it's important to identify them by name and representative jurisdiction. If you are unsure how to do this, reach out to your TA facilitator for help. Once all elected officials---local, state and federal--- for your community are identified, be sure to review and match active members of the *PLACE MATTERS* team with the officials who represent them. Leverage the fact that team members are voters who have helped elect these officials. Be sure to connect the easy dots first.

Step Two

All elected officials—federal, state and local -- have offices in the community and should be briefed on the *PLACE MATTERS* team work; the local elected official in your *PLACE MATTERS* community should be approached first, but each outreach can follow the same guidelines:

- Call the office and ask to speak to the scheduler when requesting a meeting with the elected official or inviting them to an event;
- Call the office and ask for the staff member who deals with the dominant topic area--- schools, health, transportation, housing, employment, etc---to ask for an appointment.

Step Three

It's important to prepare for what will be said when you meet or talk with an elected official or their staff. If more than one member of the *PLACE MATTERS* team attends the meeting, be sure to decide beforehand who will say what. And always end with a thank you and an agreement about a next step: what can the elected official do or what information can you provide the elected official to continue to keep the *PLACE MATTERS* work in the forefront of the person's mind.

- Productive discussions should take between 30 and 60 minutes.
- The *PLACE MATTERS* team member should always start with "We wanted to brief you on the work that is happening here in your district. Our *PLACE MATTERS* team is part of a national laboratory project and is focusing on social determinants of health and well being in our community."
- Ask who among their colleagues would be interested in this subject matter.
- Ask if you can use them as a reference to secure a meeting with that person to brief them about *PLACE MATTERS*.
- Always have a one-page summary of *PLACE MATTERS* to leave behind that's specific to your team and the request you are making of the elected official.

Step Four

Always follow up with a thank you letter that includes a restatement of what was agreed upon as the next step. Keep the official and the staff up-to-date on a quarterly basis about the activities the team is undertaking. Find ways to help present or testify before committees of elected officials or panels of policymakers on the social determinants of health.

CONNECTING WITH YOUR ELECTED OFFICIALS

CHECKLIST

- Identify your team's local, state, and federal elected officials.
- Identify the local, state, and/or federal offices (as applicable) for each elected official and secure the contact information.
- Identify staff members who deal with specific topics (i.e. schools, health, transportation, housing, employment, etc.) and secure the contact information at their respective offices.
- Identify the scheduler for each elected official and develop a relationship with this person. Be sure to ask how the scheduler likes to receive requests for appointments.
- Schedule meetings/phone calls with each of the elected official of between 30 to 60 minutes to discuss the *PLACE MATTERS* work (At least 2 *PLACE MATTERS* team members should attend this meeting).
- Prepare introduction and documentation for the elected official being mindful of the approach that should be used depending on if the official is local, state or federal. The *PLACE MATTERS* one-pager should be handed to the elected official at the meeting AND emailed/mailed prior to the meeting/call.
- Re-confirm meeting with the scheduler 24 hours prior to the meeting to ensure there have been no changes in the elected official's calendar. NOTE: You should try to call once a week to check on your appointment.
- Attend the meetings with the elected officials and take notes (please refer to the toolkit for tips on how to speak with the elected official).
- Send a "Thank You" note to the elected official no later than 48 hours after the meeting summarizing the meeting discussion and any items for follow-up.
- Send updates/reports about your *PLACE MATTERS* Work to each of your team's elected officials on a quarterly basis.

NOTES:

CONNECTING WITH YOUR ELECTED OFFICIALS

THE DETAILS

STEP ONE

Get ready to make and keep in contact with the elected official's office!

- **Be Prepared.** If you're contacting an elected official on a particular issue, spend some time preparing so that you can effectively communicate what the problem is, any relevant information about the problem, and what you want them to do about it. This may include bringing *PLACE MATTERS* fact sheets or other background information to leave with the legislator, or creating a list of *PLACE MATTERS* talking points for yourself to help you remember key points you want to highlight or remember.
- **Do Your Research.** Learn the names of key elected officials and a little bit about them (i.e. what district they represent, professional backgrounds, interests, committee assignments, legislation that they have supported, etc.) Their biographies are easily found on the Internet. If you are unsure about who represents the community, "Google" to ask the question. Other avenues for seeking out information about elected officials would be the legislator's personal website (if they have one), or the local newspaper and State House News.
- **Get to Know the Staff.** More often than not, you will likely be working with the legislator's aides. Legislative aides are key members of an elected official's team. They relay on their aides greatly for information and guidance on important issues. Invite them to a *PLACE MATTERS* team meeting. Building good relationships with legislative aides and communications staff within the office is essential to having a good relationship with any elected official.
- **Be a Resource.** Remember that you have valuable information and expertise that elected officials may want or need. Determine ways the *PLACE MATTERS* team –individually and collectively-- can be a resource in a variety of interest areas helpful to the elected official, such as
 - Technical knowledge of public health issues
 - Connections with program staff and/or constituents
 - Identifying and providing access to data and other information

STEP TWO

How do you request a meeting?

- **Call and send an email to request an appointment** . Dial your legislator’s office number. If you do not know it, call the main number to the US Congress, the State House and City Hall and ask for your legislator by name. Be sure to identify yourself as a constituent. Include information about yourself; describe what you want to discuss; and when you would like to meet. Give the names of anyone who will be with you. *Example: (“My name is John, and I am calling about..... the (name specific legislation) bill.... or.... the budget for nutrition and wellness programs.”)*
- **You may be connected to the legislative aide** or sometimes, the receptionist will note down your message and purpose. Don’t be disappointed about talking to an aide or the receptionist. These staff members are powerful and will communicate your message to the Legislator! If you speak to an aide after talking to the receptionist, be sure to re-state your name, and your address, and that you are a constituent. Repeat what you said to the person who answered the phone in the legislator’s office.
- **If the aide begins a conversation** with you, it will be helpful to have short, 30-second message. *Example: (“I am calling to urge the Senator to restore physical education schools in the budget.” , or “I am calling to thank the Senator for voting for the Childhood Obesity Prevention Bill. “)* Then if you wish and if there is time, say why this is important to you. *Example: (“My mother is without dentures because dental benefits were cut.” or “I work with adolescents, and I am seeing more of them as overweight with no options for physical activity and healthy foods. We are glad you are helping to address these problems.”)*
- **Before you hang up**, be sure to ask what your elected official’s opinion is on the topic. Thank them for their time. Clarify what is the process for securing the appointment and let them know you will call again!
- **Before the meeting**, follow up by calling the elected official’s office and ask to speak with the scheduler to confirm the appointment. Let the office know how many and the names of all the people attending. It is best not to exceed five people in a meeting. And always remember to do the homework: practice your message, organize your thoughts, identify who will say what and prepare any necessary materials.

STEP THREE

What do you do during the meeting?

- **Arrive on time.** Call the legislators' office if you are running late.
- **Show respect for everyone in the office.** If meeting with a staff member, be sure you have the correct contact name. Legislative aides are powerful and important in shaping the policymaker's opinions.
- **Deliver your message in three minutes or less.** Be sure to introduce yourself and your colleagues by name. Give your message briefly, clearly, and respectfully
- **Bring others with you.** A good number is no more than 5 people total for a meeting.
- **Be prepared to answer questions.** If you do not know the answer to a question, say that you will get back to them. Making up an answer is worse than saying "I don't know."
- **Ask what they think.** Ask what their ideas are about how to move forward.
- **Be a resource.** Offer your time and help. Leave them with your card or information on how to contact you.
- **Provide material to support your position.** Bring fact sheets about *PLACE MATTERS* or the bill/budget item or issue on which you are advocating and about the community you represent (your organization/coalition). Make sure the information is clear, accurate, informative, and supports your point.
- **Avoid using an ultimatum.** It is good to make a specific request. It is usually not productive to make an angry demand. Better to persist and follow up than back someone into a corner.
- **Follow up with a thank you note.** Be sure to include any additional information you may have promised or that may be relevant.

STEP FOUR

Remember the follow up is as important as the meeting.

- **Keep in Touch.** Call or write elected officials on both the good and the bad. Thank them when you are pleased with their actions or support, and constructively communicate to them when you are not. Once your *PLACE MATTERS* team identifies the community issues underlying the social determinants of health, let your elected officials know how it affects the community he/she represents.
- **Be a Resource.** Remember that you have valuable information and expertise that elected officials may want or need. Find ways to be a resource in areas of interest that are important for the *PLACE MATTERS* team and the elected official, such as
 - Technical knowledge of public health issues
 - Connections with program staff and/or constituents
 - Access to data and other information
- **Follow Through.** If you offer to be a resource or provide more information, be sure to follow through on any specific actions you agree to take.
- **Be Responsive.** Another key to any good relationship is to be responsive. It is important for elected officials and their staff to know they can rely on you to provide information, speakers or other resources as quickly as possible.
- **Show Your Appreciation.** Always remember to thank an elected official at every contact for their time and their support. Thank you notes and public recognition are always appreciated.

What is *PLACE MATTERS*?

The Elevator Speech:

PLACE MATTERS is a national initiative of the Joint Center for Political and Economic Studies, Health Policy Institute. We are funded by the W.K. Kellogg Foundation and designed to improve the health of participating communities by addressing the social conditions that lead to poor health. We are one of 16 PLACE MATTERS Teams across the nation responsible for designing and implementing policy strategies to mitigate that address the social conditions that negatively impact the health of communities.

The History:

In 2005, with a generous grant from the W.K. Kellogg Foundation, the Joint Center Health Policy Institute (HPI) launched the *PLACE MATTERS* initiative. Although researchers have determined that altering social factors can affect individual well-being and modify health outcomes and risks for illness, the use of this research has been limited to policy and practice settings, particularly in low-income and communities of color. The goal of *PLACE MATTERS* is to reduce health disparities by addressing their complex underlying causes.

To accomplish this goal, HPI formed leadership teams comprised of racially and ethnically diverse professionals from the private, public and religious sectors representing 22 counties in 13 states. The teams began participating in Design Laboratories where learning, information sharing, strategizing and planning takes place. All teams were charged with the design and implementation of creative approaches to reduce racial and ethnic health disparities by addressing their root causes.

In various cities around the country, the HPI/ *PLACE MATTERS* Teams have made collective and individual progress toward unraveling the complex maze of how social factors can and do contribute to health disparities. Their approaches vary significantly. One team has decided to tackle racism head on, while another joined forces to design a regional approach to improving transportation safety options for migrant farm workers, while yet another team looked at how land use decisions and ordinances on building construction can promote healthy or unhealthy behavior.

Eliminating the social factors that have produced poor health outcomes takes time and will not happen over night. But with education, recognition and action, HPI/ *PLACE MATTERS* is making a positive difference in the community.

BASIC TEMPLATES

General Letter of Introduction

Dear [Elected Official]:

Thank you for all that you do to support our community. My reason for writing is to share with you the connectedness of social conditions and poor health outcomes in low-income and communities of color, especially in our community.

I am a resident of

Earlier this year the Public Broadcasting System (PBS) aired a compelling story of what is destroying communities. The film—a seven-part series called “Unnatural Causes/ Is Inequality Making Us Sick”—pointed out that social and political structures in many communities are ill-prepared to address, inequalities in healthcare, housing, education, employment, etc., and that these factors are negatively impacting health outcomes. To reduce this trend, changes will be required to improve overall individual health and build healthy communities.

If you've heard discussions regarding “social determinants of health” this may all sound familiar. Recently social and medical researchers collaborated with California News Reel to produce this powerful four and a half hour documentary for PBS airing. “Unnatural Causes” (www.unnaturalcauses.org) is available in DVD and makes clear that the PLACE where you live, the color of your skin, income, education and your emotional stress MATTER a great deal and can determine both health outcomes and longevity.

I am fortunate to be associated with a *PLACE MATTERS* Team in [insert county/counties.] *PLACE MATTERS* is a national initiative of the Joint Center for Political and Economic Studies, Health Policy Institute. We are funded by the W.K. Kellogg Foundation, and *PLACE MATTERS* is designed to improve the health of communities by addressing the social conditions that lead to poor health. We are one of 16 *PLACE MATTERS* Teams across the nation responsible for designing and implementing strategies that address the social conditions that are negatively impacting the health of local residents.

Our *PLACE MATTERS* ' Team is a diverse group of [insert the make-up of your team (non-profit agency, health, education, religious and policy)] individuals. We are engaging the community regarding [insert your initiative paragraph].

Our team members would appreciate an appointment [state the reason for the meeting, i.e. to brief you and your staff about the *PLACE MATTERS* work that is unfolding in our community.]

I will contact your office shortly to schedule an appointment.

Sincerely,

[Insert your name, title, and organization, phone #]

PLACE MATTERS Team Leader

&

PLACE MATTER Team Members

[Insert list of PM team members by name, title and organization]

Talking Points:

- *PLACE MATTERS* (PM) is a national initiative of the Joint Center for Political and Economic Studies, Health Policy Institute (HPI)
- PM was designed to improve the health of communities by addressing social conditions through policy and/or systems change.
- PM is NOT a health program but is supportive of programs that lead to better health outcomes.
- Currently there are 16 *PLACE MATTERS* Teams located throughout the United States.
- PM Teams are a diverse mix of non-profit agency, health, education, religious, business and policy individuals who are committed to improving the health of communities.
- PM Teams are responsible for designing and implementing policy strategies that will change the social (font changed to italics?) *conditions impacting the mental and physical health and well-being of communities.*
- *These social conditions that impact health are often referred to as social determinants of health.*
- Addressing poor health outcomes at the historical or root cause (s) rather than seeking a cure for the immediate problem is also referred to as “upstreaming.”
- **The Joint Center for Political and Economic Studies** is one of the nation's premier research and public policy institutions and the only one whose work focuses exclusively on issues of particular concern to African Americans and other people of color.
- **The Health Policy Institute’s** mission is to ignite a Fair Health movement that gives people of color the inalienable right to equal opportunity for healthy lives. Its work contributes to the improved health status of people of color, and by expanding their participation in political, economic, and public policy arenas.
- HPI provides assistance to participating PM Teams by conducting forums for peer-to-peer learning opportunities, technical assistance, grants, professional facilitation, and access to data and national level experts.
- The Kellogg Foundation is the major funder of the *PLACE MATTERS* Initiative.
- [Add more as you see fit...]

KEY MESSAGES

Key Messages are phrases that represent the main ideas you want to express to your elected officials. They reinforce what your elected official may already know about the issues you highlight, or they might counter current beliefs and work to change opinions and hopefully important policies. Key Messages open the door to direct communication with your elected officials, because they bridge what they may know with what you are trying to discuss.

Key Messages are:

- Short: one brief, memorable sentence or phrase
- Concise: avoid jargon and acronyms
- Active: make every sentence active
- Positive: talk about what you can do, not what you can't
- Specific: address a particular challenge or issue
- Credible: provide examples to back it up

Write out your key messages

- 1.
- 2.
- 3.
- 4.

PLACE MATTERS

PLACE MATTERS is a national initiative of the Joint Center for Political and Economic Studies' Health Policy Institute (<http://www.jointcenter.org/hpi/pages/place-matters>) designed to improve the health of participating communities by addressing social conditions that lead to poor health.

WHAT WE DO:

As of July 2007, our national learning community consists of 16 **PLACE MATTERS** Teams responsible for designing and implementing strategies that address the social determinants of health impacting residents in 21 counties and 3 cities. HPI provides technical assistance to participating Teams in the forms of facilitation, Design Lab meetings that include national-level experts and peer-to-peer learning opportunities, technical assistance grants, and access to data.

HPI APPROACH:

The Joint Center HPI approach to eliminating health disparities involves identifying the complex underlying causes of health disparities and defining strategies to address these root causes. A growing body of research clearly supports the notion that interventions targeting the social determinants of health can indeed modify patterns of health, illness, and health disparities. Addressing **upstream causes of health (e.g., employment, education, poverty, housing, etc.) through action and policy development and measuring the indicators associated with social determinants of health are at the heart of our PLACE MATTERS work.** With generous funding provided by the W.K. Kellogg Foundation, the **PLACE MATTERS** Initiative attempts to address these social determinants through the work of the participating Teams.

To date, HPI has invited many resource partners to join us on this important journey, including but not limited to: The California Endowment, the National Association of Counties (NACo), the National Organization of Black County Officials (NOBCO), the National Association of County and City Health Officials (NACCHO), the International City/County Management Association (ICMA), and the Henry J. Kaiser Family Foundation. The Joint Center HPI contracts with CommonHealth ACTION (www.commonhealthaction.org) to develop and implement the Design Lab learning experiences and to provide technical assistance to **PLACE MATTERS** participants.

PARTICIPATING COUNTIES AND CITIES:

- Alameda County, CA
- Baltimore, MD
- Bernalillo County, NM
- Boston, MA
- Cook County, IL
- Cuyahoga County, OH
- Jefferson County, AL
- Marlboro County, SC
- Martin Luther King, Jr. County, WA
- Mid-Mississippi Delta Counties: Coahoma, Washington, & Sunflower, MS
- Orleans Parish, LA
- Prince George's County, MD
- San Joaquin Valley Counties: Fresno, Kern, Kings, Merced, Madera, & Tulare, CA
- Sharkey-Issaquena Counties, MS
- Washington, DC
- Wayne County, MI

What are Social Determinants of Health?

Social conditions are major determinants of health. Social forces acting at a collective level shape individual biology, individual risk behaviors, environmental exposures, and access to resources that promote health. There is a graded relationship between social position and health status that affects people at all levels of the social hierarchy. While public health programs alone cannot ameliorate the social forces that are associated with poor health outcomes, developing a better understanding of the social determinants of health is critical to reducing health disparities among Washington State residents of differing socioeconomic position.

From *The Health of Washington State: The Social Determinants of Health, 2002.*

For additional information regarding this initiative, please contact Joint Center Vice President and HPI Director, Dr. Brian Smedley (bsmedley@jointcenter.org).