

Advocate Self-Introduction Worksheet

Advocates should use this worksheet as they plan for meetings with congressional staff, members, and other policymakers. Use this worksheet to organize your thoughts and refine your messaging.

1. Introduction

- ☐ Name
 - ☐ Credentials
 - ☐ Title
 - ☐ Facility/Hospital/Institution
 - ☐ Location (City-Congressional District)
 - ☐ Job Description
 - ☐ SHEA leadership position (if applicable)
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2. Why are you here?

- ☐ Relate the advocacy issue to your (relevant) role/responsibility.
 - ☐ Familiarize yourself with the issue, bill language (if applicable), and SHEA's ask.
 - ☐ State the issue's impact on the city/state/region/congressional district you live in.
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3. Tell a story.

- ☐ Describe a time when a situation was resolved through your expertise and/or available resources.
 - ☐ Describe how your research has contributed to improved patient safety, quality of care delivery, patient outcomes, or the cost of care.
 - ☐ Discuss a "lesson learned" during or following a public health event or local outbreak in your facility.
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4. How does the state/federal program being discussed work?

- ☐ Describe how the program works and how it support your facility, research, or the work you do.
 - ☐ Describe how the program promotes high quality delivery of care and patient safety.
 - ☐ Describe how the program protects patients and the community from severe illness and preventable deaths.
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1. Introduction

If you have multiple roles (example: clinical site, academic affiliation, research program), it is best to emphasize or limit your introduction to the one related to the issue/program you want to focus on for the meeting. It is not necessary to list every role. If you're unsure, focus on the role/description that may be readily recognizable to the staffer or the member of Congress. Most staffers/members will readily recognize a healthcare facility/system/research center in their district. If you have a personal relationship with a member of congress or staffer, state it up front.

Try to describe what your average day (or week or month) looks like and how your expertise supports your roles and responsibilities. Keep this description brief and in the simplest terms. Feature the roles/responsibilities that are related to the reason you are meeting with them. Include your leadership role if applicable.

Consider whether the role being described is "invisible." When things are going well, are you rarely seen or heard? If comfortable, consider describing how hospitals are surveyed or evaluated for quality, where and when performance is publicly reported, and your role/responsibility in interpreting the results.

2. Why are you here?

You may not be tasked with delivering the "ask", but you should be familiar with it and should be able to discuss a problem/solution that you are personally able to support. If your description of the issue/problem has the potential to sound frightening, try to frame the solution as early in the discussion as possible and in a way that sounds optimistic and promising. Try to balance the negative with the positive and avoid a "you must do this or else" approach.

3. Tell a story.

What are the issues that keep you up at night? Which issues have a basic solution that only require raising awareness to get done? Which issues are deemed important but get put off until they become a crisis that can be avoided with appropriate planning and investments? Which solutions may lead to cost savings in the form of a reduction in adverse outcomes, extended hospital stays, missed days at work? Avoid telling stories or making statements giving the impression that the current state of healthcare quality is poor, deteriorating, or is under imminent threat.

4. How does the state/federal program being discussed work?

Discuss how the state/federal program that is the subject of the meeting works. Describe it from the perspective of a customer/user/constituent. You do not need to understand the inner workings or represent the agency of authority's perspective. Describe how you interact with the program and/or gain access to what it provides. Include opportunities or challenges that could be resolved with additional support, funding, or statutory authority.