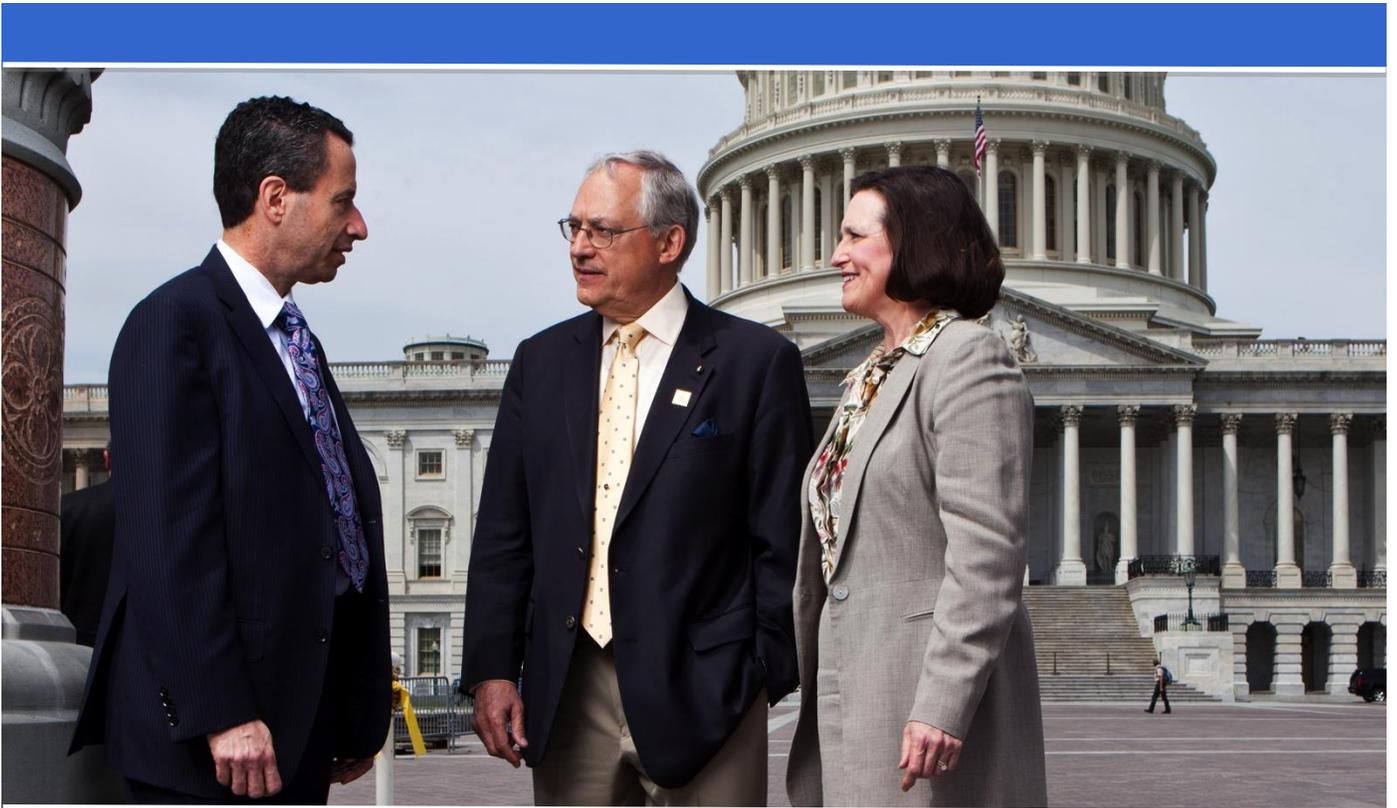


# Action Team Leader Toolkit



# Introduction

American Dental Association Political Action Committee (ADPAC) strives to enhance the effectiveness of ADA's grassroots lobbying by mobilizing dentists to gain the legislative support of key officeholders for dental issues. This toolkit serves as a guide to successfully communicate and influence your member of Congress both in Washington, D.C., and back home.

The 2012 election showed that grassroots organizations can be extremely effective at achieving results on a national level. As a constituent, a health care provider, and a small business owner, you **CAN** affect public policy. Dentists are located in every congressional district and come from all walks of life. Dentists have successfully balanced providing high quality health care to their patients while simultaneously running a successful practice. Members of Congress often look forward to engaging with dentists and the health care community. ADPAC will help you further these relationships.

**ADPAC would like to thank Dr. Frank Graham who led the revisions of this document.**

**The ADPAC Board would like to thank Drs. Bob Butler, Mark Desrosiers, and Gary Oyster for contributing to the toolkit.**

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# What is Grassroots and Why is Grassroots Critical?

Congress is going to make decisions that affect your patients and your practice. It's a certainty. You have a choice; you can sit on the sidelines or you can get involved and help shape the outcome. By being active in ADPAC's grassroots program, you and your family will have a direct role in the fight for oral health.

- Grassroots activism consists of a group of people with shared interests coming together for a cause in which they believe, in order to help influence public policy.
- As an Action Team Leader, you are asked to develop a personal relationship with your member of Congress (MOC). Your own personal grassroots political activity is as much a part of dentistry today as patient care, because ultimately the future of oral health care delivery will be affected by politicians in Washington, D.C.
- As dentists, we must recognize that when our profession becomes the subject of legislation we will either win or lose. How much is won or lost depends, in part, on our effective grassroots political participation — your participation. If you are successful as an Action Team Leader, public policy will be positively affected.
- In our competitive system, every citizen falls into one of two categories. They are either “players” in the system — individuals who not only vote, but actively compete within the political arena — or they are “victims” of the system.
- Your input to legislators provides ADA's lobbyists with the political support they need in order to be persuasive.
- An extensive grassroots network makes our PAC donations more powerful and our lobbyists more effective. Ultimately this creates better public policy.
- Your relationship may grow in importance, for example: your MOC may run for higher office. Members of Congress will remember their long-time supporters; do not pass up this opportunity.

# ADA Grassroots Organizational Structure

## ADPAC

ADPAC is the controlling authority for the ADA grassroots program. The ADPAC Board is responsible for working with the constituent societies, coordinators and the Action Team Leaders (ATLs) in their trustee districts to ensure that all action teams are functioning. The ADPAC Board does not appoint ATLs or coordinators — this is the responsibility of the constituent society.

## State Coordinator

Oversees and encourages ATLs to stay active and become involved- a state coordinator can be a dentist, spouse or constituent staff.

## Action Team Leaders

Engage their team to maintain a political presence in the congressional district by participating in legislative and political activities. Dentists and spouses can serve as ATLs.

## Action Team Members

Maintain a political presence in congressional districts by responding to Action Alerts and becoming active in a lawmakers' reelection efforts. Dentists, spouses and students can serve as Action Team members.

## Role of Constituent Dental Society

The constituent society is responsible for appointing ATLs and coordinators, promoting grassroots action and encouraging members to become involved in other activities. Constituent societies also determine who will attend the Washington Leadership Conference. Several constituent societies forward Action Alerts to Action Teams and post important grassroots information on their websites.

## Role of State PACs

While state Political Action Committees (PACs) do not have an official role in the grassroots program, it should be noted that many state PAC chairs and activists also are active in the Action Team network, serving as ATLs, coordinators, or team members. For efficiency purposes, many constituent societies prefer their PAC and state grassroots leaders to serve in the Action Team network.

*(Continued on next page.)*

## **Role of the ADA Washington Office**

The ADA Washington Office maintains the list of ATs and coordinators and provides Action Teams with resources and support. The Washington Office also provides political education training for constituent societies and promotes the grassroots program at various dental meetings around the country. Lobbyists and policy staff prepare Action Teams for meetings with lawmakers. ADPAC staff assists with home fundraisers, campaign volunteering and Action Team recruitment.

## **Role of Dental Spouses and Students**

Members of the Alliance of the American Dental Association participate frequently in activities on behalf of dentistry. They can be very important players in your grassroots efforts, providing additional support and resources to your Action Team. A spouse can also serve as a team leader.

# Creating a Powerful Dentist Advocacy Team

As an Action Team Leader, you have been asked to build a strong network of dentists in your district who will advocate for the ADA, their colleagues, and oral health care:

- First, reach out to dentists that you feel most comfortable with. For example, mention your work for ADPAC to dental school friends or fellow members of your practice.
- Explain to your colleagues what ADPAC does, its successes and why it is so important to join now. Review the ADPAC fact sheet attached to help you explain ADPAC.
- Use local and state ADA meetings to reach potential new members of your team.
- Contact the ADPAC grassroots manager, Nick DeSarno at [desarnon@ada.org](mailto:desarnon@ada.org) or 202.789.5168. Nick can provide you with lists of dentists in your congressional district who have been previously active in politics.
- Organize your team and collect all of their information including email addresses and cell numbers, this will help when inviting them to special political events and to remind them of actions that they can take part in at home.
- Invite your team to political fundraisers, town hall meetings, congressional visits and other events.
- Without your help and enthusiasm, ADA's grassroots activism would never be able to accomplish its goals. You **CAN** make a difference; choose to lead a team today!

# How to Develop a Relationship with Your Member of Congress

Members of Congress receive more than 250,000 pieces of mail every year and hold 10-15 meetings a day with constituents or lobbyists. It is very important to develop strong and lasting relationships with your member of Congress. Below are some ways you can begin to create a relationship:

- Host a home fundraiser for an ADA-supported MOC.
- Meet with your MOC in Washington and back home.
- Invite your member of Congress to tour your dental office.
- Invite him or her to a local dental organization meeting.
- Attend town hall meetings, roundtable discussions and political rallies.
- Follow your MOC on social media sites like Twitter and Facebook.
- Sign up for email alerts and newsletters from your lawmaker's website.
- Volunteer for their campaign.
- Write an op-ed about dental care and mention your MOC's leadership on the issue.
- When an important issue arises, call your congressional office and talk with the health care legislative assistant.
- Attend fundraisers, golf outings and other events hosted by your MOC.
- If you serve on a civic or community group, offer to be a liaison with the representative's office and keep their district office informed of any big issues or events.
- If your MOC gets on a new committee or wins a prestigious award send him or her a letter of congratulations.
- Follow up with thank you notes after meetings or events.

# How to Work with Congressional Staff

The vast majority of meetings on the Hill are between congressional staff and lobbyists or advocates. Staff members are experts on legislative processes. As an advocate, you have the opportunity to offer yourself as that issue area expert while you get the benefit of an interested and open ear in return — a true advocacy opportunity. Below are some points that will guide you in the right direction when dealing with congressional staff:

- Don't automatically seek the highest pay grade person you can speak to in the office, work with the staff member that is actually responsible for the legislation you're concerned about.
- Most staffers on the Hill have not developed their issue area expertise by actually working in the industry; this provides an opportunity to serve as a policy expert.
- They are representing the member "in absentia", therefore talk to them as if they were the MOC.
- Congressional staff brief their bosses on every pending piece of legislation. The briefing mentions any constituents or advocacy groups that have lobbied for or against the bill. It is your goal for the staffer to adequately address your position in this briefing.
- Staff cannot personally take a stand on an issue, however it is their job to advise the member in the member's best interest.
- Do not force a staffer to commit absolutely to a specific bill one way or another, this will force the staffers into an awkward position. Instead try to get their commitment to your position in general.
- Staff can rarely guarantee commitment on a final vote on a bill before the vote takes place.
- Because bills often change significantly (up to the very last minute), if one particular amendment passes, it may force the member to vote differently on final passage.

# The Do's and Don'ts of Congressional Meetings

Face-to-face meetings are an extremely important part of issue advocacy. Whether you are meeting with a member of Congress or a member of their staff, these rules will help guide you in the right direction:

## Do:

**Know the name of the office scheduler.** He or she is the only person in the office who will be able to properly take your information and schedule a meeting.

**Send a request for a meeting well in advance.** Make sure that you consistently follow up and document all conversations with the congressional office.

**Prepare carefully and thoroughly for your meeting.** Take the time to learn the ADA issues and background information on your MOC.

**Personalize in the beginning.** Always start the meeting with some personal details about your life in the district, your family, organizations you are involved with and your practice.

**Stay on message.** Stick to a small number of issues that you have a strong understanding of and provide professional insights.

## Don't:

**Engage in partisan critiques.** Although you may be a member of a political party, the ADA and ADPAC are non-partisan organizations and have developed relationships on both sides of the aisle.

**Be late to the meeting or show up too early.** Offices on the hill are extremely busy. Showing up too early or a few minutes late is not desirable.

**Get upset if you have to wait.** Offices are extremely busy and schedules change constantly.

**Expect to always meet the member of Congress.** A meeting with the health care legislative assistant is extremely advantageous. Staffers often have strong influence with the MOC. You should treat the staff member with the same level of respect as you would a member of Congress.

# 10 Steps to Composing Effective Letters and Emails

Congressional offices receive more than 250,000 pieces of mail a year and only have a small staff to manage responses. Form letters are a great way to show large support for an issue, but unique and individualized letters will receive more attention. Here are some steps that will help your letter or email get noticed:

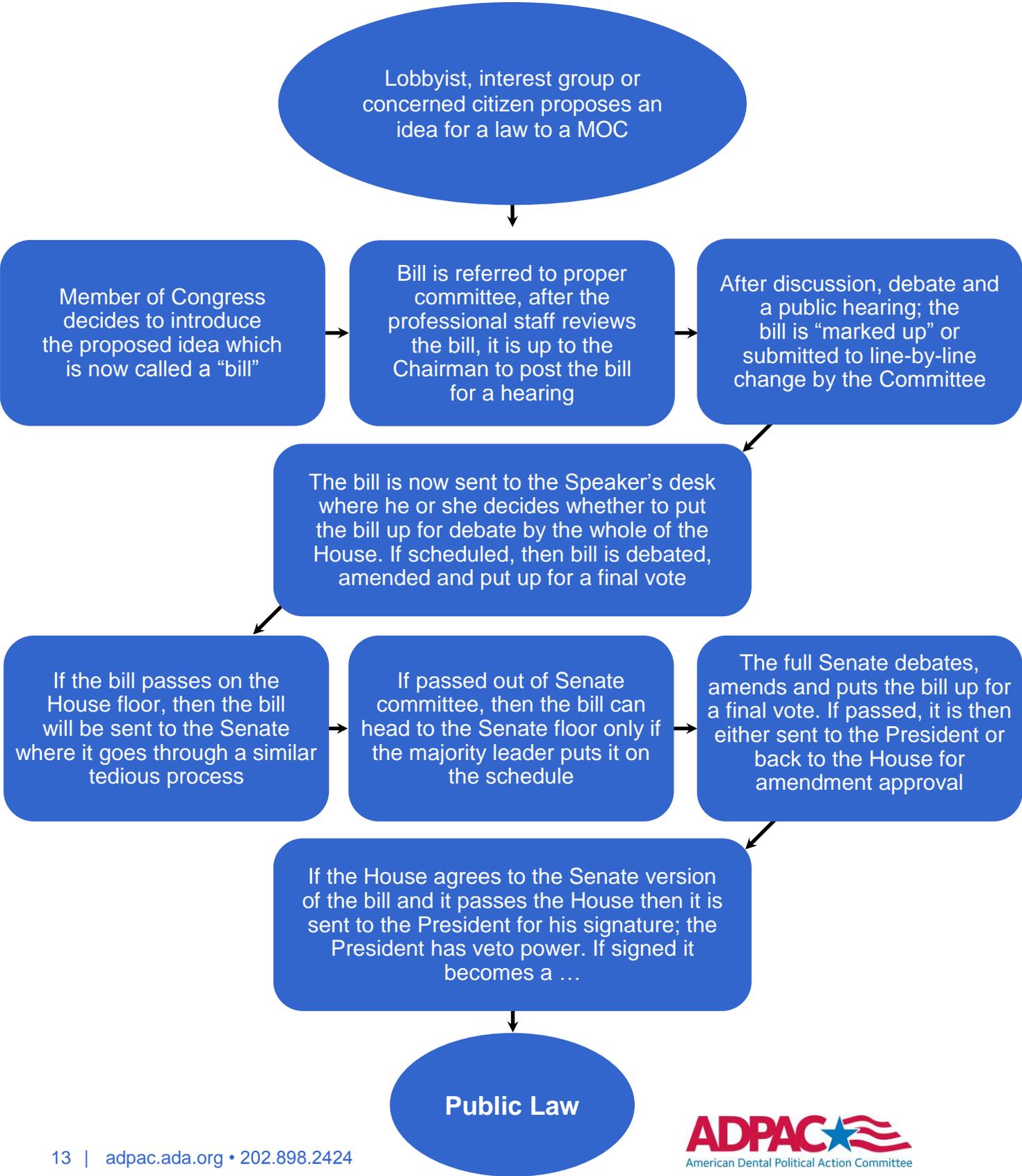
1. **Identify yourself as a constituent.** Put your name and address on any email, fax or letter. Congressional offices will only respond to their own constituents.
2. **Always be respectful and be sure to use proper titles.** Be sure that you address a Senator as Senator; not Congressman or Congresswoman.
3. **Be brief.** Members of Congress and their staff have limited time and are handling multiple issues simultaneously. Ensure that your argument is clear and concise.
4. **Establish credibility.** You are an important health care provider in your community and you understand the unique challenges that affect your profession.
5. **Personalize your message.** Do not fall into the trap of just repeating fact sheets, but actually tell a short story of how this issue has personally affected you or your practice.
6. **Do not use threats or lie.** Members of Congress take extreme offense when they are threatened with votes or donations. Just because you have voted for the MOC in the past doesn't mean that he or she has to vote in favor of your position. Threats will immediately end the relationship.
7. **Make the letter actionable.** Ask your lawmaker to do something. For example, ask him or her to sponsor a piece of legislation.
8. **Make sure that your message is timely.** If a vote on an important issue is coming up make sure to send that letter or email immediately. Regular mail takes at least two weeks just to get to a congressional office.
9. **Always include contact information.** This will ensure a timely response.
10. **Spread the word.** Send your letter to fellow dentists and colleagues in your area. Encourage them to follow your example and compose a similar message.

# Home Fundraising 101

An average congressional race costs more than **1.6 million dollars!** One of the most meaningful ways to develop a relationship with your MOC is to invite him or her into your home for a fundraiser. Each dollar raised by a member of Congress is extremely crucial and any fundraising opportunity is taken very seriously. Hosting a home fundraiser or even just a meet-and-greet at your home will be extremely beneficial to developing a relationship with your member of Congress. This guide is just a starting point; ADPAC has a more detailed step-by-step guide available. Below are steps that will help guide you through this process:

1. First contact the ADPAC team. If the candidate is backed by ADPAC and the state, we will contribute \$1,500 to your event.
2. Contact the campaign office of your MOC or candidate and speak with the finance director; it is important to never contact the official office of a MOC when the issue is campaign related.
3. Set a monetary goal, theme and capacity for the event. Set realistic price options, and then ask for 20 percent higher. Create a budget and stick to it.
4. Create an invitation and ask the Finance Director for a list of campaign supporters in your area.
5. Create an attendance list: invite fellow dentists, other health care providers, friends and family. ADPAC will help with guest lists and can provide names of supportive dentists in the area. You may want to invite other local elected officials or business owners.
6. In the last week, take an inventory of who has yet to respond and call them personally. This will truly make the difference and will significantly raise the final total. Remind unavailable guests that they can still make a donation toward the event even if they are unable to personally attend.
7. The day before hold a run-through of the event with the fundraiser or campaign volunteer.
8. On the day of the event, talk with the guests about volunteer opportunities to help the campaign. Enjoy the event and make sure to send thank-you notes to everyone involved. Send the ADPAC team pictures of the event, so that we can share your hard work with your colleagues.

# Basic Outline of the Legislative Process



# The Organizational Structure of Congressional and Campaign Offices



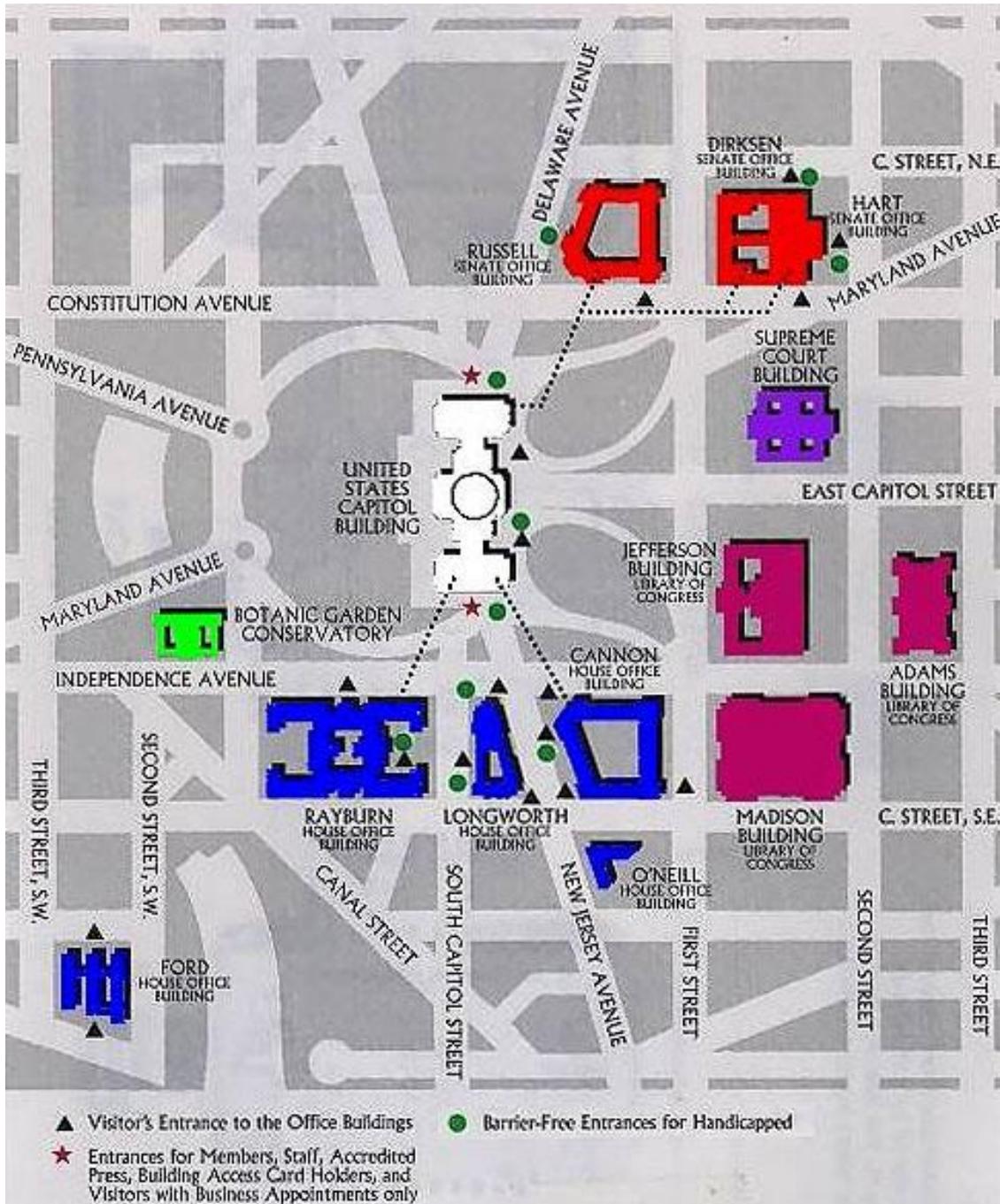
# Example of a Member of Congress' Schedule

Members of Congress maintain a hectic schedule that frequently changes. Schedulers have the daunting task of trying to balance various competing interests. Below is a sample schedule:

*Votes are held throughout the day, can be called at any time and take between 15 minutes to an hour.*

8 - 8:30 a.m.	Meeting with Congressional Art Competition winner for the 8th District
8:30 - 9:30 a.m.	Party Caucus Meeting
9:30 a.m. - Noon	Small Business Committee, Full Committee Bill Markup
10:45 a.m.	Meeting with Legislative Staff to discuss pending issues
10 a.m. - Noon	Budget Committee, Full Committee Bill Markup on H.R. 2218, "Preserving the Future of Social Security Act"
10 a.m. - Noon	Science, Space, and Technology Full Committee Hearing on "NOAA's Climate Service Proposal"
11:30 a.m.	Legislative Business begins on the Floor of the U.S. House of Representatives (votes throughout day)
12:15 - 1 p.m.	Lunch at Capitol Hill Club with potential donors
1 - 1:30 p.m.	Lunch with boy scout troops from district
12:30 - 1:30 p.m.	Policy Board weekly meeting
2 - 2:30 p.m.	GOP Doctors' Caucus Press Conference
2:30 - 3 p.m.	Capitol Hill Tour with Constituents
3:15 - 3:30 p.m.	Call with Reporter from FOX News
4:15 - 5:15 p.m.	Constituent Meetings in Office
4 - 5 p.m.	Reception in Rayburn for the National Association of Manufacturers
5:15 - 6 p.m.	Fundraiser at Capitol Hill Club with elite donors from MI
7:15 - 8:15 p.m.	Dinner with lobbyist discussing medical device tax implications
8 - 9 p.m.	Fundraiser hosted by ADPAC
8:30 - 10 p.m.	Conference call with Campaign manager and consultants

# Map of Capitol Hill



## Key

- House Office Buildings: **BLUE**
- Senate Office Buildings: **RED**
- Library of Congress Buildings: **MAGENTA**

# ADPAC Fact Sheet

## What is ADPAC?

- The American Dental Association's Political Action Committee.
- Dedicated to supporting federal candidates for public office who champion issues important to dentistry, your practice, and your patients.
- Works to raise funds to help elect candidates who understand the importance of dentistry and health care in America.

## Why is ADPAC Important?

- ADPAC is a non-partisan voice for thousands of dentists.
- Public policy affects every aspect of your daily life.
- As a dentist, you need a seat at the table to work toward positive legislative outcomes in favor of your profession.

## What are the Benefits of Getting Involved?

- You are able to support the growth and advancement of a public policy environment to meet your needs.
- Together, we are better able to ensure that your voice is heard in Washington, D.C. and across the country.
- With your help, we can improve oral health care and ensure a successful future for dentistry.

## 2012 Election Cycle Results

- ADPAC disbursed \$2.3 million hard dollars in the 2012 election cycle.
- In the same time, ADPAC spent \$400,000 soft dollars on independent expenditures.
- 91 percent of ADPAC-supported House candidates won.
- 77 percent of ADPAC-supported Senate candidates won.
- Congressman Paul Gosar (AZ-04) and Congressman Mike Simpson (ID-02), both dentists, were re-elected to the 113th Congress.

# ADPAC's Philosophy of Giving Guidelines

ADPAC considers many factors before contributing to a candidate for the U.S. House or U.S. Senate. Among these are committee assignments, accessibility in Washington and in the state/district, leadership positions, and positions on dental issues. No incumbent or candidate is entitled to receive funds. States may always choose to not give to an individual.

Though all committees perform important work, only certain committees have jurisdiction over health care, dentistry, taxation, small business, etc. Below are the key committees to dentistry in the House of Representatives:

## Key House Committees

Committee	Jurisdiction	Range of Giving
Energy and Commerce	Health Care Issues	\$3,000-\$5,000
Ways & Means	Taxation	\$3,000-\$5,000
Appropriations	Programmatic Funding	\$3,000-\$5,000
Education and Workforce	Student and Labor Issues	\$2,000-\$5,000
Oversight and Government Reform	Student Issues	\$2,000-\$5,000
Judiciary	Labor and Immigration Issues	\$2,000-\$5,000

## Secondary House Committees

Committee	Jurisdiction	Range of Giving
Armed Services	Military Dental Health System	\$2,000-\$2,500
Budget	Programmatic Spending	\$1,500-\$2,500
Rules	Determines Bills for Voting	\$1,500-\$2,500
Veteran Affairs	Veterans Health System	\$1,500-\$2,500
Science and Technology	Health-Related Technology	\$1,500-\$2,500
Small Business	Small Business Issues	\$1,500-\$2,500

\*Members not on the above committees have little to no jurisdiction over dental issues or health care. Members who serve on other committees are still eligible for contributions based on other factors.

*(Continued on next page.)*

## Senate Committees

Priority committees for dentistry in the Senate are Finance; Health, Education, Labor and Pensions (HELP), and Appropriations. All Senators are eligible for a maximum contribution to both their primary and general election funds and leadership PACs when they are not up for reelection.

## Open Seats and Challengers

States are encouraged to identify candidates for open congressional seats as well as challengers to incumbents with whom the ADA has been unable to establish a meaningful relationship. In these cases, the state recommendation is the primary criteria used in making a decision. These candidates are eligible for maximum contributions should the state see fit.

## Opposition Giving and Dual Giving

When making an ADPAC contribution, ADPAC strongly encourages contributions to friendly incumbent congressional candidates over opposition candidates. ADPAC will consider opposition candidates if the incumbent is actively anti-dentistry. Also, ADPAC strongly discourages giving to opposing candidates in congressional races.

**\*The entire ADPAC Philosophy of Giving document is available upon request.**

# ADPAC Resources

It is ADPAC's goal to provide each Action Team Leader with the tools and information needed to be successful advocates. Below are some additional resources that ADPAC has made available. Thank you for choosing to make a difference and we look forward to working with you in the future.

## **ADPAC Website ([adpac.ada.org](http://adpac.ada.org)) includes:**

- Names, emails and phone numbers for your local ADPAC board member.
- Sign up for the Action Alert E-List, so you will be able to receive emails from ADPAC when urgent action is needed.
- A list of our legislative accomplishments.
- A breakdown of federal and state legislative and regulatory issues.
- A newly created section on the fight for access to oral health.
- Tools to look up your Member of Congress and his or her staff.
- In-depth toolkits that cover issues like “Home Fundraising” and “Meeting a Candidate.”
- Webinars, and other powerful resources that will help you be a successful advocate.

## **ADPAC Staff can assist with:**

- Hosting home fundraisers.
- Locating politically involved dentists in your district.
- Hosting advocacy training events and presentations.
- Scheduling congressional tours or events.

## **ADPAC Staff:**

- Nick DeSarno, Grassroots Manager: 202.789.5168 or [desarnon@ada.org](mailto:desarnon@ada.org)
- Sarah Milligan, Director: 202.789.5171 or [milligans@ada.org](mailto:milligans@ada.org)
- ADPAC Main phone: 202.898.2424