

# ADA Grassroots Action Team Network Resource Kit: Conducting a Dental Office Tour with Your Lawmaker

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## I. Why Conduct a Dental Office Tour?

Just about everyone in this country goes to see his or her dentist — including our federal, state and local lawmakers. But most people know little about dentistry, and the way a dental office works. And in the case of elected officials, many do not understand how legislative issues affect the practice of dentistry.

Inviting your U.S. Representative or Senators to tour your dental office is one of the most effective ways of educating them on dental issues, and it can benefit everyone involved — you, your colleagues, your profession, and your lawmaker.

### **An office tour can:**

- Educate your lawmaker on the profession of dentistry and the legislative issues that are important to dentists;
- Give your lawmaker greater insight into the different specialties and the complexities of running a dental practice;
- Give your lawmaker the opportunity to meet voting constituents in his or her state or district;
- Put a human face on key legislative issues for dentistry, by demonstrating firsthand how your office, your staff, and your patients will be affected by them; and of course
- Show your lawmaker there's no reason to be afraid of going to the dentist!

### **A. Planning a Successful Office Tour**

Guiding your federal lawmakers on a well-conducted office tour can go a long way toward promoting dentistry's legislative interests in the Congress. As with any important event, however, a successful tour requires careful planning and preparation.

## **Scheduling**

If you and your Action Team members have already established a close relationship with your lawmaker, it is highly likely that he or she will accept an invitation to visit your office. Consider:

- Extending the invitation at a personal meeting, when you are discussing a key issue that directly affects your practice;
- Reminding the lawmaker of your invitation when you follow-up your meeting with a thank-you note;
- Including a tour of your office as part of another event you and your Action Team are conducting for your lawmaker, such as a "meet and greet" reception or a speaking engagement.

If you and your Action Team have just begun to develop a relationship with your lawmaker, and you do not know him or her well, the following steps may be helpful. Remember, always contact the ADPAC staff and your constituent society for assistance prior to any grassroots activity.

- Send a written letter of invitation to your lawmaker at his or her Capitol Hill office and be sure to send a copy to the District Director. In your letter, be brief, but also be as specific as possible about what you want to show the lawmaker and what you hope he or she will learn from the tour. (See Sample letter.)

- Follow-up your letter with a phone call to your lawmaker's Appointments Secretary and/or District Director to schedule a specific date and time.

- Although many federal lawmakers come home to their districts every weekend, you may find that they will have more time for a tour during a Congressional recess. See Congressional recess schedule.

- Suggest that your lawmaker bring a staff person (e.g., health legislative assistant). Determine how many people will be coming and plan accordingly.

- Propose starting the tour at the beginning of the day, if possible, perhaps with a continental breakfast, or coffee and donuts. That way you can be sure that your visitor will be fresh and attentive, and will be less likely to be delayed by other meetings.
- Don't be discouraged if it takes several invitations to schedule a tour. Remember that lawmakers have many demands on their time.
- Be sure to inform the ADA Washington Office, your component and constituent dental societies, and your Action Team of the tour plans.

### **Staff**

As a dentist, your staff is one of your most valuable and interesting resources. To your lawmaker, your staff members are voting constituents. That's why you should be sure to let your staff play the critical role they deserve to play when your lawmaker comes to visit.

Once you have scheduled your tour:

- Inform your staff members of the date and time of your lawmaker's visit, and provide them with biographical information on him or her.
- Briefly discuss the key legislative issues that will be the focus of the tour, and/or provide them with a one-page summary. (ADA's Washington Office can provide you with this type of information.)
- Determine roles that your staff members can play on the tour. If you have a small office, you might have individual staff members briefly describe their duties and, if possible, connect a legislative issue that impacts their jobs.
- Assign a specific staff member as a contact person for the lawmaker's office, if you cannot be reached.
- Be sure to introduce every staff member to the lawmaker by name. Try to include staff members whom you know are politically active or who have a special

relationship with the lawmaker or a member of his/her staff. Remember, one of your lawmaker's goals is to meet constituents.

### **B. Tour Logistics**

You have a great deal to accomplish during your office tour, and your lawmaker may have limited time to visit. Use the following guidelines to help plan an effective and efficient tour:

- Work with your lawmaker's scheduler to determine how long he or she can stay. Try to plan a tour that is flexible and can accommodate last-minute changes.
- Determine exactly what you wish to accomplish on the tour. What issues are you trying to emphasize and how are they best illustrated? What equipment, techniques, and practices will you highlight?
- Consider having your lawmaker visit two or three different offices, such as those of your fellow Action Team Members. A multiple office visit, showing different aspects of dentistry or dental specialties could multiply the impact of your message.
- Determine ways in which your dental colleagues can help you prepare and plan for your tour. Enlist the help of your fellow Action Team members, your state and local dental societies.
- Do not overlook the role that the Alliance of the American Dental Association, the dental spouses' organization, can play in planning and conducting your tour.
- Try to maximize the benefits of your tour by planning it around a breakfast, luncheon or "meet and greet" reception, if your lawmaker's schedule allows. Invite your colleagues and their spouses to attend. (Note: In order to assure compliance with the gift ban rules of the U.S. Congress, check with the ADA Washington Office before finalizing plans.)
- Map out a tour of the office and choose areas you want to highlight and places where you need staff participation. Develop an agenda that includes time for you to

show your office, demonstrate your equipment, and introduce your staff and colleagues, and for your lawmaker to address participants and answer any questions. (See Sample Agenda.)

- If you are taking your lawmaker on a tour of multiple offices, remember to factor in travel time.
- Work with your staff, colleagues, and the lawmaker's office to address logistical details. Determine your guests' arrival time and where you will meet them. Arrange for transportation or parking, if necessary. Put someone in charge of refreshments or meal arrangements.
- Prepare an information sheet for your lawmaker that highlights the key points of your tour and emphasizes the legislative issues that directly affect your office.
- Arrange for someone to take photographs of the lawmaker visiting your office and meeting your staff members and colleagues.
- Determine if the lawmaker would like local press coverage of the tour.
- Make sure that all the equipment you wish to demonstrate is working properly on the day of your tour. Technology and activity make a tour more interesting.
- It may be helpful to conduct a "dress rehearsal" of your tour to make sure that all questions, problems and details are addressed.
- The Office Tour Planning Sheet and Tour Timeline will help you remember the details of planning your tour. Delegate responsibilities among your staff members and colleagues. The more people involved, the more credibility they give to your issue concerns and the more human interest they add to your tour.

### **C. Conducting Your Tour**

All your advance planning and preparation will pay off on the day of your tour, when you, your staff and your colleagues will be the "stars" of the show.

Here are a few steps to follow as you conduct your tour:

- Move through the tour at an even pace, and keep track of time. Don't rush the lawmaker, but try to stay on schedule as much as possible.
- Remember your goals for the tour. As you demonstrate equipment and describe procedures, don't forget about the legislative issues you want to emphasize. Point out areas where more research, technology and education would help your practice, for example, or describe how better healthcare laws or OSHA reform would make your practice more efficient and cost-effective for patients.
- Give the lawmaker time to visit with staff and patients.
- If you have planned a lunch or reception, give the lawmaker time to address the audience and take questions.
- Provide the lawmaker and his or her guests with handout material you have prepared.
- As you conclude your tour, thank the lawmaker and his or her guests for their time, and ask your lawmaker for help and support on the issues you have presented. If you have addressed a specific piece of legislation that is pending, don't hesitate to tell your lawmaker what you want. "I hope that this visit has shown you why your support for H.R. \_\_\_\_\_ is essential," for example.

### **D. Following Up Your Tour**

Once your tour has concluded, it is very important that you follow up with your lawmaker to remind him or her of the politically active dental community in the state or district and their legislative concerns. You should:

- Write a note to your lawmaker and each of his or her guests to thank them for their visit. In the note, re-emphasize key issue points you made during the tour.

- Send the lawmaker any information that you promised to provide.
- Express an interest in following your lawmaker's political and legislative activities. Ask to receive your lawmaker's newsletter. If you have your own newsletter or update, put your lawmaker on the mailing list.
- If any photographs were taken on the tour, send copies to the lawmaker. The ADA government affairs staff would also like to print them in an issue of the Dental Advocate.
- Provide the lawmaker with copies of any written articles about the tour, such as local newspaper articles, newsletter articles from your state or local society, or copies of the Dental Advocate.
- Build on the success of your tour by continuing to plan and participate in activities with your Action Team, the Alliance of the American Dental Association and your state or local dental society. Your tour should help establish you as a "friend" of the lawmaker, and help pave the way for future grassroots activities.
- Keep track of what your lawmaker is doing, and how he or she votes on issues of importance to dentistry. Be sure to send a thank you note if your lawmaker supports you and your colleagues on an issue!
- Contact the ADA Washington Office and your component and constituent dental societies to inform them of the results of your tour and any new information that you might have learned. This will help keep the message from dentists consistent. (See Activity Report Form.)

All these activities will help reinforce the relationship with your lawmaker that is created or enhanced by your tour. If you treat your lawmaker to a well-organized, well-attended and informative tour — and you follow-up — you will continue to prove to him or her that you are a political asset whose views should be given serious attention and consideration.

## II. Sample Office Tour Agenda

1. Welcome & Introductions
2. Overview of the Practice/Profession
  - a. Type of practice/service offered
  - b. Number of employees
  - c. Number of patients served
  - d. Type of equipment/technology used
  - e. Specific legislative issue(s) of concern
3. Conduct Office Tour
  - a. Introduce staff and colleagues
  - b. Explain operations and procedures
  - c. Demonstrate equipment
  - d. Tie in key legislative issues
4. Remarks by Lawmaker
5. Q&A
6. Optional: Meet and Greet Reception, Breakfast, Luncheon or Dinner

## III. Office Tour Timeline

### Eight weeks from your tour date:

- Consult with your Action Team, the ADA Washington office, your state or local dental society, and your office staff about conducting a tour of one or more dental offices in the district, and determine two or three possible dates.
- Extend an invitation to your lawmaker — either at a personal meeting or by a phone call or letter — to visit your office.

### Seven weeks:

- Follow up your invitation with a call to your lawmaker's Appointments Secretary to schedule a date, time and location(s) for your tour.
- Send a written confirmation letter to the Appointments Secretary and include directions to the office.

- Inform the ADA Washington, DC Office, your Action Team, and your state or local society of your confirmed tour date.

#### **Six weeks:**

- Determine your tour agenda, what issues you wish to discuss, and what equipment or techniques you wish to demonstrate.
- Work with staff and/or members of your Action Team, the Alliance of the American Dental Association or your state/local society to determine roles they will play and contributions each can make.
- Determine whether patients will be in the office at the time of the tour, and plan accordingly.
- Contact your lawmaker's office to determine if anyone from his/her staff will be accompanying the lawmaker.
- Address logistical details such as refreshments, transportation for the lawmaker and guests, parking, etc., with your staff, colleagues, and/or Action Team members. Assign specific responsibilities for each.

#### **Five Weeks:**

- Arrange for someone to take photographs during the tour.
- Determine whether there should be press coverage of the tour and who will arrange it.

#### **Four Weeks:**

- Prepare an information sheet for the lawmaker that highlights key issues and points you plan to emphasize during the tour. Consult with ADA's Washington Office for assistance.

#### **Three to Two Weeks:**

- Make sure that all equipment is working properly for the upcoming tour.

- Finalize all logistical details concerning refreshments, transportation, parking, and photographer.

#### **One Week:**

- Conduct a "dress rehearsal" of the tour
- Prepare copies of the information sheet to handout to the lawmaker and his/her guests.

#### **Day of Tour:**

- Set up a "message center" with a designated staff member to receive messages for the lawmaker.
- Make a final check of all equipment.
- Conduct the tour, distribute handout materials, and ask for the lawmaker's support on key dental issues.
- If planned, host luncheon/reception with larger group of dentists, staff and/or Action Team members.

#### **Follow-Up Activities:**

- Send thank you notes to the lawmaker and any guests who attended the tour. Send any information that you promised, or tell the lawmaker when to expect the promised information.
- Send the lawmaker copies of photographs taken on the tour. Send additional copies to the ADA Washington Office for possible inclusion in the Dental Advocate.
- Provide the lawmaker with copies of any newspaper or newsletter articles about the tour.
- Report back to the ADA Washington Office, your Action Team leader, and your state or local society about the success of your tour and any new information you learned. Be sure to fill out and send the Dental Office Tour Activity Report Form to the Washington Office.

#### IV. Planning Sheet for Dental Office Tour

Name of Tour sponsor: \_\_\_\_\_

Name of Senator/Representative: \_\_\_\_\_

Congressional District: \_\_\_\_\_

Names & Titles of Guests: \_\_\_\_\_

Date of Visit: \_\_\_\_\_

Time: \_\_\_\_\_

Office Location(s) for the Tour: \_\_\_\_\_

Action Team Members or other Dentists or Spouses Participating: \_\_\_\_\_

Office staff members participating: \_\_\_\_\_

Legislative issues to be discussed: \_\_\_\_\_

Transportation for guests needed? \_\_\_\_\_

Parking needed: \_\_\_\_\_

Parking location: \_\_\_\_\_

Estimated Arrival Time: \_\_\_\_\_

Met by whom? \_\_\_\_\_

Luncheon or Reception planned? \_\_\_\_\_

Number Attending: \_\_\_\_\_

Food/Beverages to be served: \_\_\_\_\_

Location of Luncheon/Reception: \_\_\_\_\_

Contact Person for Luncheon/Reception: \_\_\_\_\_

Handouts: \_\_\_\_\_

Prepared by: \_\_\_\_\_

Photographer: \_\_\_\_\_

Action Team Leader: \_\_\_\_\_

Contacted ADA Washington Office: \_\_\_\_\_

## **V. Sample Letter of Invitation**

Date

The Honorable (Name):

Address

City, State, Zip

Dear Senator/Representative (Name):

As a dentist in your state/district, I would like to take the opportunity to invite you to tour my office and to meet my colleagues and the members of my staff. The profession of dentistry is facing very significant legislative challenges, both in Washington, D.C., and in (name of state). At the present time, I am particularly concerned about (issue), and the impact it will have on my practice, my patients, and the other dentists in our community. I would like to illustrate this potential impact by showing you my office, explaining how it operates, and describing my particular area of expertise.

I realize that your schedule is extremely busy, and that you have been in a dentist's office before as a patient. I can assure you that this tour will be much more informative — and less stressful — than your previous visits. I am hoping that you might be able to visit us when you are in the district on (day/date) at (time), or another mutually agreeable date in the near future. I will call your office shortly to confirm this date, or to schedule another.

I am looking forward to your visit.

Sincerely,

cc: ADA Washington Office  
Constituent Dental Society  
Component Dental Society

## **VI. Sample Thank You Letter**

Date

The Honorable (Name)

Address

City, State, Zip

Dear (Name):

On behalf of my colleagues and the members of my staff, I would like to thank you for visiting our office on (day, date). We appreciate your taking the time to tour our office and to share your thoughts on (issues discussed). I hope that you found the tour as informative and enjoyable as we did.

As dentists, my colleagues and I continually seek to provide the highest quality, most cost-effective dental care to our patients. Legislative issues such as the ones we discussed have the potential to profoundly impact our ability to do this, as I hope we have illustrated in our tour. Please do not hesitate to contact me if there is any further information I can provide for you on issues of importance to dentistry or on the practice of dentistry in general.

Thank you again for your visit.

Sincerely,

**VIII. Dental Office Tour Activity Report Form**

Name of Tour Sponsor: \_\_\_\_\_

Address: \_\_\_\_\_

Business Phone: \_\_\_\_\_

Home Phone: \_\_\_\_\_

State & U.S. Congressional District: \_\_\_\_\_

Action Team Leader: \_\_\_\_\_

Senator/Representative who visited your office: \_\_\_\_\_

Date of Tour: \_\_\_\_\_

Legislative Issues Discussed: \_\_\_\_\_

Lawmaker's Response: \_\_\_\_\_

Names of Action Team Members, Alliance Members and/or

Other Colleagues who participated in tour: \_\_\_\_\_

What worked well in planning and implementing your tour: \_\_\_\_\_

What would you improve or do differently: \_\_\_\_\_

Please provide any additional comments or suggestions: \_\_\_\_\_

**Please return this form to:**

ADA Grassroots/ADPAC  
1111 14th Street, NW, Suite 1200  
Washington, DC 20005