



BUSINESS

FINANCIAL NEWS, GROWTH STRATEGIES, AND BEST PRACTICES FOR PROVIDERS AND SUPPLIERS

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Best Practices Q&A:

Marsha Greenfield, Vice President of Legislative Affairs, LeadingAge

As vice president of legislative affairs for LeadingAge, Marsha Greenfield, J.D., represents the association on all health-care issues, including financing, Medicare and Medicaid, patient safety, elder abuse, and medical liability reform. We asked her why advocacy is important to senior living organizations and how they can effectively lobby their elected officials.

• Why is it important to foster relationships with elected officials?

For senior living providers, even those that are completely private pay, federal and state programs—whether it’s Medicare, Medicaid, HUD, or other programs—play a huge role in operations, both in funding and on the regulatory side. Legislators make decisions that are critical to an organization’s existence, and the organization’s voice should be heard. Also, legislators value your vote. Staff members vote, residents vote, their families vote... each executive director or administrator represents many people—hundreds and even thousands in some cases. And everyone is affected by a legislator’s policy and funding recommendations.

Lobbying means asking a legislator or regulator to make a decision that supports your position. You set out all your arguments, providing good examples; but the reality is, the legislator and his or her staff are less inclined to take your call or meet

with you if you haven’t established a relationship. You need to build your credibility.

• **How can organizations initiate and grow those relationships?** Every legislator depends on staff briefings. If a staff member recommends something, the legislator is more apt to listen. Go to your elected official’s district office, meet the staff, explain who you are, and tell them you’d like to be a resource on senior issues. Local staff members will also refer you to people in the legislator’s state and national offices. That referral will make your call more likely to be taken seriously by the legislator.

Also, boards of directors are responsible for keeping the organization going and improving it, so advocacy is certainly something that board members can and should do. When vetting board members, find out whom they know.

• **What does lobbying entail?** In addition to building a relationship with elected officials and their staff, invite them to your facility to meet residents or to a groundbreaking, a dinner, or another event. They’ll have a very different view and a much better understanding of your issues. And when those staff members get to know you, the people that you serve, and what you do, you increase your

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Best Practices Q&A:

Marsha Greenfield, Vice President of Legislative Affairs, LeadingAge (cont.)

credibility. You want to become their resource when they need help answering a relevant question about senior living. And it doesn't cost a penny—simply showcase what you do!

Legislators need to understand that senior living providers are good stewards of the federal dollars. Politics won't matter once legislators understand, at gut level, the issues that you're dealing with and how they can help. And even if they don't currently serve on a relevant committee, you never know where they—or their staff—will end up, given the revolving door of politics.

• **How does advocacy/lobbying differ for not-for-profits vs. for-profits?** For-profits have fewer restrictions than not-for-profits. For-profits can have PACs, make campaign contributions, and endorse candidates. And they don't have to account for their lobbying dollars. Not-for-profits must lobby only on the issues; by law, they cannot be involved in political campaigns, other than inviting all candidates to the facility. If only one candidate comes, that's not a problem; but you must invite them all if you invite any. Once candidates are elected, not-for-profits can meet with them anytime and oppose or support their legislation. Not-for-profits also must account for their lobbying dollars and are limited in their expenditures, although few actually reach their limit.

• **What internal resources can organizations leverage?** Large organizations often assign people to do governmental relations but also involve residents and staff. Other organizations become committed to an issue that affects those that they serve. But it's important for the CEO or executive director to encourage action—say, writing a legislator—and perhaps provide education as to why certain issues are so important; but it must never appear coercive.

When an issue arises, you want everyone—trustees, employees, residents, as well as leadership—to call legislators. Senior housing residents are particularly effective when the issues are personally important. A resident of one CCRC, for example, who was concerned that the IRS was imputing interest on refundable entrance fees to residents, led a lobbying effort within the community to get the law overturned...and succeeded. Sometimes legislators pay more attention to a “real” person than to a lobbyist. □