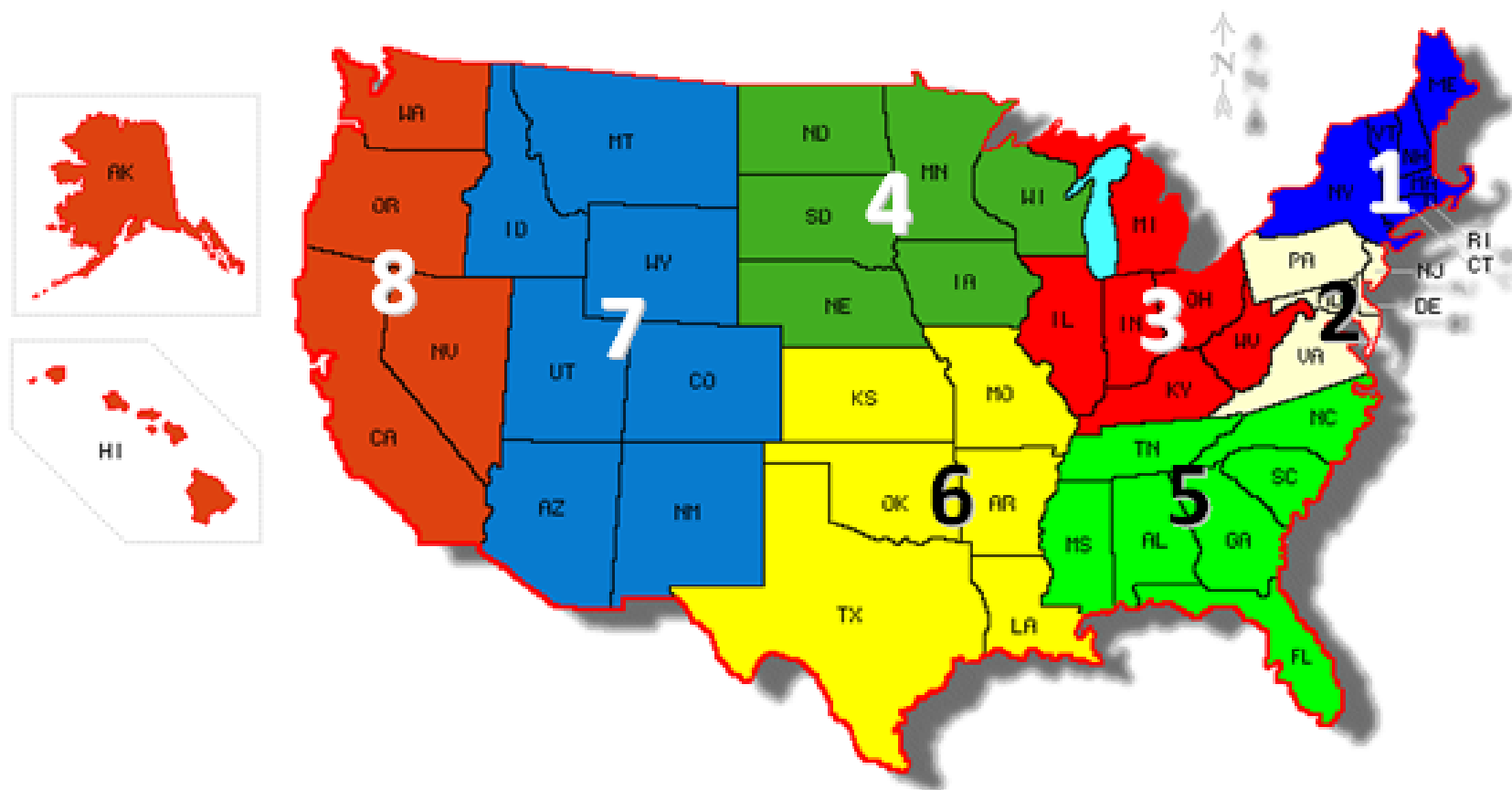


NAHU Legislative Chair Training

So you're a Legislative Chair...Now What?



NAHU State Staff



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Overview of Responsibilities

- **Major Responsibilities:**
 - Managing the legislative and regulatory activities of your chapter, and
 - Serving as the link between your chapter and
 - NAHU office staff,
 - Legislative Council
 - NAHU Board of Trustees

Managing Your Chapter's Government Relations Activities

- **Establish a team of people to help you.**
 - Create a line of succession
 - No one should be legislative chair for life!
 - Important policy decisions should be made by a representative group of members.
 - Ensure that all of the work gets done in a timely manner, with no one volunteer shouldering too much of the load.

State Legislative Committee

- **Who should be on your team?**
 - State legislative chair
 - State legislative vice-chair
 - Representatives from each of the local chapters,
 - State President,
 - State President-elect
 - State Exchange Coordinator Representative
 - HUPAC chair
 - State PAC chair
 - Media chair, and the
 - Chapter lobbyist

State Legislative Committee

- **How often should you meet?**
 - At least monthly, even when the state is not in session.
- **Assign everyone a job**
 - PAC
 - Grassroots
 - Coalition Building
 - Monitoring the State Department of Insurance
 - Working with the state lobbyist
 - Election activity, etc.

State Legislative Management Team

- Develop a State Legislative Management Team to make emergency decisions.
- So that decisions are not, or don't appear to be, made in a vacuum, the team should include a few critical officers such as:
 - State President
 - Legislative Chair
 - Vice Chair
 - Lobbyist

Establish Broad Policy Positions for Your State on Key Issues

- Prepares your chapter to quickly respond to legislation that surfaces in your state
- Develop a P&P on how policy positions by the state association are approved, and then follow that structure.
 - Ex., State Board votes to approve policy positions. Share with members.
- Disagree in private, but **speak with one voice** in public..
 - Review the NAHU guidelines for chapters on speaking with one voice.
- Talk to your state affairs director. Other states may have experienced similar problems.

Serving as the Link Between Your Chapter and National

It's legislative chair's job to disseminate legislative information provided by national back down to the state board, the state legislative committee, local chapters and the rank and file membership.

How You Can Communicate...

- **With Your Members**

- Give regular legislative updates at chapter meetings
 - Even a quick 10 min rundown works!
- Participate in monthly regional legislative teleconferences
 - Contact your State Affairs staff for recurring time and date
- Grasstops, Grasstops, Grasstops!
 - Find out who your members know and utilize it!
- Legislative Events:
 - Day on the Hill
 - Candidate Briefings
 - Health Care 101
 - Education days with legislators

How You Can Communicate...

- **With NAHU**
 - Keep in contact with your State Affairs staffer
 - Participate in monthly Regional Legislative Chair calls
 - Read the Quarterly State Update
 - Read the Weekly Washington Update
 - Utilize the resources of Operation Shout!

You Are the Strongest Link Between Your Chapter and NAHU

- The other part of this job, which is just as important, is **communicating** the feelings of your state membership about policy issues back to national and keeping us informed and involved in legislative and regulatory activities going on in your state.

How NAHU Communicates with You

- The **Washington Update**, which goes out almost every Friday, gives members up-to-date information about health insurance issues pending on Capitol Hill.
- NAHU regularly runs legislative **articles in HIU**, including a monthly column on federal issues.
- The most widely used source of information for legislative chairs, policymakers and other interested parties is the **NAHU website**—www.nahu.org.
- And always feel free to contact us.

What Can NAHU Do For You?

NAHU Legislative Chair Services

- Assist with legislative language and strategy for pending state-level legislation and regulations.
- Develop charts, testimony, position statements, articles, analyses, and other policy documents.
- Operation Shout
- Source of information about federal issues, trends, etc.
- Provide the ability to connect with other states to address trends, share information and develop policy (working groups, monthly calls)
- Link to other stakeholder groups
- Back you up with state legislators, regulators, and other officials

The NAHU Government Relations Staff

- **Janet Trautwein**
Executive Vice President and CEO
- **Marcy M. Buckner**
VP of Government Affairs
- **Pam Mitroff**
Senior Director Health Reform Compliance
- **Phil Miatkowski**
Manager of State Affairs
- **Kristen Skiles**
Manager of State Affairs
- **Husni Abdelaziz**
Government Affairs Coordinator
- **John Greene**
VP of Congressional Affairs
- **Chris Hartmann**
VP of Congressional Affairs
- **Dan Samson**
Manager of Political Affairs
- **Anthony Perez**
PAC Manager

NAHU also retains outside counsel through Peck Madigan & Jones, as well as an outside consultant through Forward Health Consulting. Through this mechanism, we have additional representation of NAHU's interests.

The Legislative Management Team

- **Ed Oleksiak**
Legislative Council Chair
- **Dave Mordo**
Legislative Council Vice-Chair
- **Don Goldmann**
NAHU President
- **Jim Stenger**
NAHU President-elect
- **Janet Trautwein**
NAHU Executive Vice-President and CEO
- **Marcy Buckner**
Vice President of Government Affairs
- **Chris Hartmann**
Vice President of Congressional Affairs

NAHU Resources

- Capitol Conference: February 22-24, 2016
- PPACA Certification Class—Register at www.nahu.org
- Legislative Chair Manual
- Compliance Corner Resources
- Compliance Corner Free Monthly Webinars
- Washington Update
- State Update
- NAHU Newswire

NAHU's Capitol Conference

NAHU hosts a Capital Conference in Washington, DC every spring for our membership.

- The event is comprised of
 - Educational training sessions for our members,
 - Legislative updates from the NAHU staff,
 - Speakers representing the Congressional and Executive branches of government,
 - Direct lobbying by the member attendees on Capitol Hill and a closing Congressional Reception.

Holding a State Day on the Hill

- If your state is not hosting an event at your state capitol – a Day on the Hill - every year, it should be.
- Engages members on legislative issues, and makes your presence known to establish yourselves as a resource to legislators and staff.
- An easy way to do it is to mimic the structure of NAHU's Capital Conference, with a combination of speakers, direct lobbying of legislators and a reception or other social function.

Holding a State Day on the Hill

- Some things to keep in mind when organizing your event:
 - Alert legislators using Operation Shout!
 - Pick the venue and the day/time carefully.
 - Make sure your legislature is in session.
 - Use an easily accessible location to members and legislators
 - Coordinate with other agent groups or other coalition partners to ensure greater attendance
 - Follow your state's protocols for scheduling lobbying visits.
 - Educate your members before you get there!
 - Work with NAHU for media

Host Health Insurance 101 Briefings

- Establish yourself as a resource group for legislators, legislative staff, the media and other groups
- Schedule before the legislative session starts or as part of your Day on the Hill.
- Legislators are generalists, as are reporters. Most of them only understand the very basics of private health insurance.
- NAHU has a template presentation – some topics to consider include (next slide)

Content for Health Insurance 101 Briefings

- How health insurance markets work
- How these markets work in other states that are regulated differently than your own (i.e., states with community rating, states with medical underwriting, states with risk pools, expanded Medicaid, or state-based Exchange).
- Changes that are expected due to federal health reform and how they impact consumers and the insurance market are still critical issues

Grassroots Activity and the Legislative Chair

- Grassroots activity, at both the state and federal levels, is a key part of the legislative process.
- NAHU has tools available to help you and your state legislative committee members with grassroots activities.
- Assign one member of your legislative committee to handle grassroots action, since all politics are local and grassroots contact is such an important part of the process.

Operation Shout!

- Operation Shout is NAHU's primary grassroots tool for members.
- Operation Shout can be utilized to contact local, state, and federal elected officials and government agencies.
- The Operation Shout website also offers details on our issue areas and legislation, in addition to talking points that can be used when talking with your legislators.

State-Level Operation Shouts!

- Operation Shout can be used to send state-level alerts
- Many states have their own system of emailing, faxing or calling their members to let them know they need to contact their legislators.
- Operations Shout can not only be a more efficient way of accomplishing that same task, but it also has many other advantages that can help you and your chapter.

Advantages of Using State-Based Operation Shout

- You can customize who you would like to receive the responses
- You can use it to contact executive branch officials too
- NAHU legislative staff can help you draft your letters and legislative alerts.
- NAHU can track your chapter's responses. This will help you:
 - Know which members of your chapter have responded (particularly helpful if you need to target specific legislators)
 - Qualify for the Triple Crown Program
 - Use the data for other award submissions (i.e., Landmark and Pacesetter)

Non-Traditional Uses for State-Based Operation Shout

- Letting state legislators know who NAHU members are, what your areas of expertise are, and how you would like to serve as a resource.
- Inviting legislators to your state Day on the Hill.
- Spreading the word to clients.

Procedure for Setting Up A State-Based Operation Shout

- To ensure that a state-based Operation Shout is really what the state chapter wants, only the state president, legislative chair, and/or lobbyist can request one.
- To order one, contact NAHU's legislative department.
- States can either prepare their own action alert and sample letters or ask NAHU staff to prepare them.
- The process generally takes only a few hours, and even less if the letter and alert are pre-made by the chapter.

Town Hall Meetings

Legislators, especially federal legislators, frequently arrange town hall meetings when they are out-of-session to get constituent feedback on key issues.

- The state legislative committee should monitor these meetings to make sure that NAHU members are invited and attend.
- NAHU staff may contact you regarding upcoming town hall meetings as well.
- Tips for attending town hall meetings:
 - Bring colleagues or clients to the meeting.
 - Prepare questions ahead of time.
 - Follow-up with a letter or e-mail.
 - Let NAHU know that you attended the town hall meeting. What happened? Any pictures taken?

In-District Meetings

- Meeting with your legislators (both state and federal) when he or she is out-of-session and back at home in the district can be a great way to make contact.
- NAHU's coalition partners frequently arrange in-district meetings with key members of Congress on specific topics.
 - NAHU government relations staff may call on you or other chapter members to participate.
- The state legislative committee may want to arrange its own meetings on specific issues or with specific representatives.

Tips for Attending an In-District Meeting

- Send a letter or e-mail requesting a meeting.
- Invite colleagues and clients to attend the meeting!
- Attendees should meet in advance to review presentation.
- Identify yourself immediately by name, business, and home town. Remember: **ALL POLITICS IS LOCAL!**
- Discussion should be focused on issue and its impact on your business, your clients, and the community!
- Leave behind written materials. Thank legislator and staff.
- Promptly fill out an In-District Debriefing Form and return to NAHU.

Building Grassroots and Grasstops Networks

- **Grasstops** are those people who have a more personal connection with an elected official
- Sometimes NAHU or the state legislative committee needs to act quickly on a particular piece of legislation, and having the ability to contact members who “really know” their elected officials at a moment’s notice can come in very handy.
- The state legislative committee needs to make it a priority to develop an up-to-date list of members that have these personal connections

Building Grassroots and Grasstop Networks

- To get up to the grasstop level, you have to start with grassroots contact, which means individual communication with your elected officials.
- Encourage the state chapter members to engage in other forms of grassroots activity. Some examples include:
 - Attending local functions where elected officials will be and introducing yourself
 - Volunteering for town board and committees
 - Becoming active in local party politics by volunteering your time, attending fundraisers, making phone calls, etc.

Regulatory Activity and the Legislative Chair

- Appoint a member of the legislative committee to oversee regulatory affairs.
- The devil is in the details and the regulatory bodies in each state are the ones that make key decisions about how laws are implemented.
- It's possible to be just as engaged in the regulatory process as it is the legislative process, but regulators are often overlooked.

Advantages to Working With Regulators

- The process is less formal.
- In most states, regulators are appointed rather than elected. They are **generally** less beholden to political forces.
- The employees of the regulatory agencies often-times work there for years.
 - Advantage - It's possible to build long-term relationships.
- There can be more opportunities for members of the public to participate in committees or boards with regulatory agencies with decision-making authority.

Who Should You Be Working With?

- The State Department of Insurance.
- NAHU members also need to be making contacts at the agencies that regulate Medicaid and the SCHIP Program.
- These contact will be particularly important now, as ACA continues to be implemented

Hiring and Managing a State Lobbyist

One of the most powerful steps a state chapter can take towards becoming a more effective legislative and regulatory presence in the state capital is to hire a contract lobbyist to represent it.

Hiring and Managing a State Lobbyist

- Having a team in place to manage the lobbyist is key:
 - Ideal function of the state legislative committee.
 - Make sure expectations are clear on both sides.
 - Set up a schedule of regular meetings and means of communication.
 - Make sure your lobbyist understands your top priorities, the basics of health insurance markets and the role of the agent.
 - Develop clear policy positions to give your lobbyist a solid guidelines to use when advocating your position.
 - Have a procedure in place for handling possible conflicts of interest.

Coalition Building

- Key component of gaining influence with legislators
- In virtually every state there are existing coalitions that work on issues NAHU is interested in.
- Your chapter ***NEEDS*** to be a part of all of these groups and coalitions.
 - Examples of these types of groups include coalitions of agent groups, healthcare coalitions, health insurance coalitions, carrier groups, and business groups.

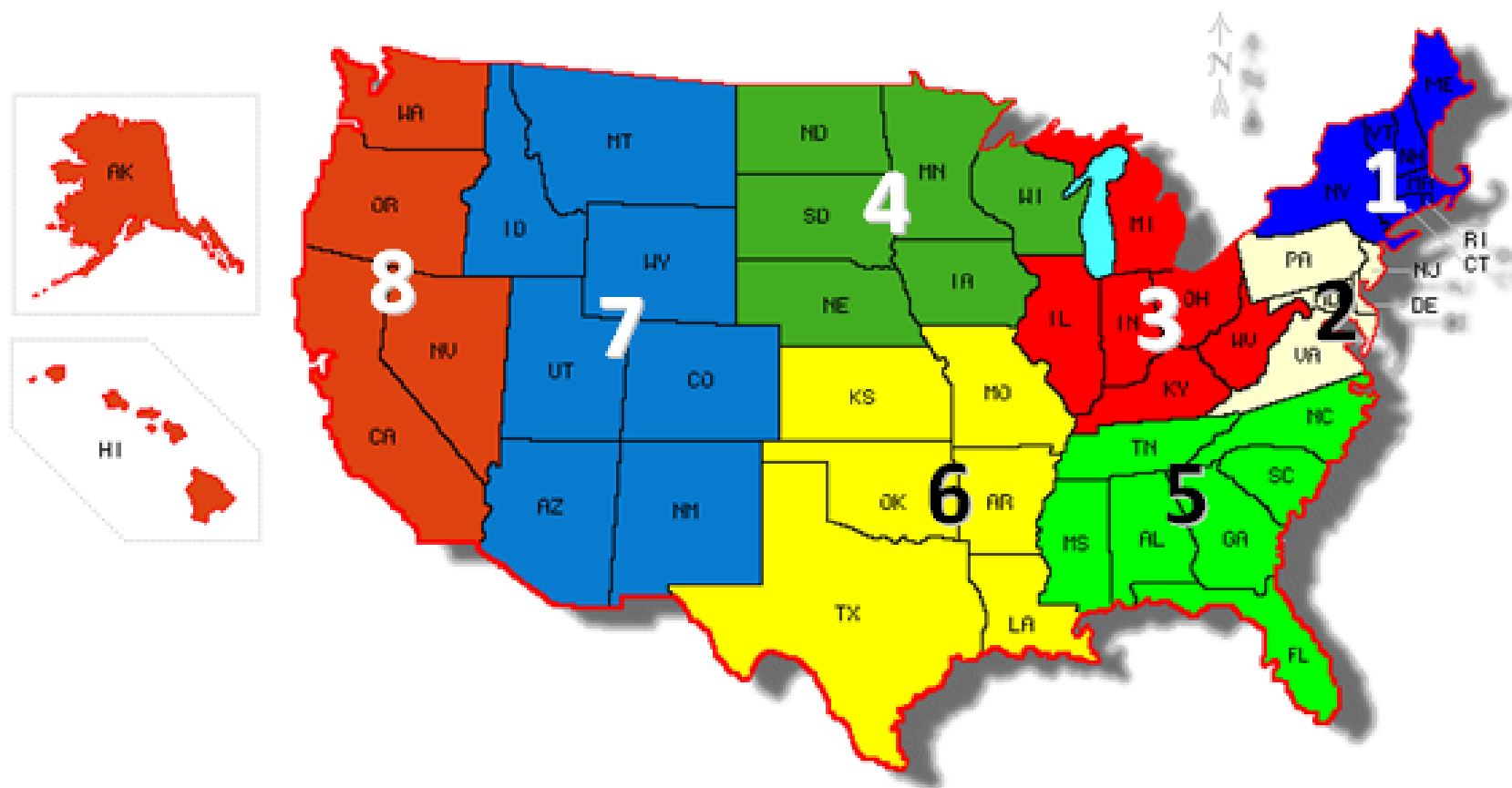
Coalition Building

- Attending the meetings and functions of coalition groups
- First of all, simply being seen at these events establishes your organization's presence.
- Second, you can glean all sorts of powerful information, and
- Third, you never know where your friends and allies are going to come from and when you are going to need them.
- An effective lobbyist can help you to gain access to these coalitions or form them if they do not already exist.

Being Proactive

- Legislators and regulators hear “No, no, no” from other organizations and constituents all the time.
- Also, many groups get wrapped up in being responsive to other people’s proposals, and they forget to advance their own positive agenda.
- Try to establish your association as a positive force for private health insurance market solutions.
- Look for areas of common ground and ways in which you can work together or modify proposals to make them more palatable.
- Volunteer to serve as a resource for anyone who needs help.

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Compliance Corner

Have specific regulatory or PPACA compliance questions?

Visit the “Compliance Corner” of the NAHU Website!

<http://www.nahu.org/education/programs/compliance.cfm>

Visit New Compliance Corner FAQs!

[http://www.nahu.org/education/programs/compliance/faqs.cfm
?ibcToken=a0492014-1240-e411-9a86-005056a75a90](http://www.nahu.org/education/programs/compliance/faqs.cfm?ibcToken=a0492014-1240-e411-9a86-005056a75a90)