Introduction

The National PACE Association (NPA) has assembled this Congressional Site Visit Toolkit so you have at your fingertips all the resources necessary to arrange a site visit to your PACE organization for a member of Congress. Visits should take place during district work periods, when legislators are back in their state or district. The toolkit includes step-by-step instructions, sample invitations, thank-you letters and a press release template.

Enabling a U.S. senator or representative to visit a PACE center results in direct experience with the PACE model of care. Having first-hand knowledge empowers a federal legislator to be a better advocate for PACE going forward. Seeing is believing! Additionally, a site visit provides a unique opportunity either to introduce yourself to your member of Congress and their staff or to reinforce existing relationships. Having a relationship helps to gain a legislator’s trust on issues of importance to our participants, programs and model of care, which will influence public policy over time.

If you need additional assistance or have questions, please contact Francesca Fierro O’Reilly, vice president of Advocacy, at FrancescaO@npaonline.org or 703-535-1537.

Invitation for a Local Visit

Typically, congressional offices ask that meeting requests be submitted via email in the form of a letter. These requests should be sent to the Washington, DC, office on your PACE organization letterhead to the attention of the scheduler. (Details on how to obtain contact information are provided below.) Your request should include several key points:

- an invitation to the representative or senator to tour your PACE organization on a particular date or a mutually convenient date (you may specify a particular PACE center location, if you like);
- a brief description of your PACE organization (and specific center, if applicable), including the number of participants and employees;
- and your contact information.

Depending on the availability of the member of Congress, it may take some time to arrange the meeting. Because congressional offices often are inundated with meeting requests, we recommend following up with a call to the scheduler for the senator or representative regarding your request if you have not heard back from the office in a week. (A sample invitation is provided at the end of the toolkit.)

Many Hands, Many Minds, ONE Goal
Contact information for members of Congress is available on the Engage page of the NPA website. In the Find Your Elected Officials section on the right-hand side of the page, enter the ZIP code of the PACE center where you would like the site visit to take place. The next page lists all of the federal and state elected officials representing that area. Click on the photo of the U.S. senator or representative you would like to invite, and a webpage will open that lists their contact information, including phone numbers and addresses for the offices they maintain in Washington, DC, and your state or congressional district.

Call the Washington, DC, office to obtain the name and email address for the scheduler. After you assemble your invitation letter, email your meeting request to the attention of the scheduler.

Follow up with the scheduler if you haven’t received a response after a week to 10 days. Once the visit is scheduled, confirm the appointment with the scheduler a week or so before the visit is to take place. After the site visit, be sure to follow up with a thank-you note. (A sample thank-you note is available at the end of the toolkit.)

**Tips for a Site Visit**

- During the planning process, ask legislators if they would like the media to be aware of the visit. (A sample media advisory is provided at the end of the toolkit.)
- If possible, time the visit to a special event, such as a groundbreaking, National PACE Month, or Employee of the Year ceremony. This may heighten the legislator's interest in attending.
- Inform employees and participants about the site visit and provide them with background information about the legislator. Prepare them so they are comfortable and not surprised by visitors.
- Arrange for a photographer to be on hand to take nonintrusive photos of the event. Elected officials like to have photos of meetings with constituents.
- Keep the visit simple. Aim to show the full range of services provided to participants, including transportation, meals, therapy, clinic appointments, the IDT room and the day room. Be sure to involve a wide assortment of participants and employees, not just management.
- Plan for the tour to take at least an hour. If possible, allow time for the legislator to meet with a group of assembled participants and employees and make some remarks.
- Be prepared to answer questions from the legislator and their staff members. If you don’t know the answer to a question, tell them you will find out and follow up.

Many Hands, Many Minds, ONE Goal
Follow Up After a Site Visit

Prompt follow-up is an integral part of the site visit.

- Email a thank-you note to the legislator and any staff that participated the day after the event, while the details of the tour are fresh in the legislator’s mind. (A sample thank-you note is provided at the end of the toolkit.)
- Using the form at the end of the toolkit, please provide NPA with feedback on the success of the site visit.

Many Hands, Many Minds, ONE Goal
Dear Representative/Senator Doe:

On behalf of PACE ORGANIZATION and our participants, we would like to invite you to visit us at a date and time of your convenience. We are located at STREET ADDRESS in CITY.

We look forward to providing you with an opportunity to see firsthand a Program of All-Inclusive Care for the Elderly (PACE®). PACE is a comprehensive, fully integrated, provider-based health plan for the frailest and costliest members of our society. PACE ORGANIZATION serves XX participants, age 55 and over, enabling them to live in the community even though they have been certified by our state as needing a nursing home level of care.

PACE ORGANIZATION provides the entire continuum of medical care and long-term services and supports required by frail older adults and those with disabilities through an interdisciplinary team approach. Our services and supports include primary and specialty medical care; home care; prescription drugs; specialty care such as audiology, dentistry, optometry, podiatry and speech-language pathology; respite care; transportation; and adult day services, such as nursing, meals, nutritional counseling, social work, personal care, and physical, occupational and recreational therapies.

In short, PACE covers all Medicare Parts A, B and D benefits; all Medicaid-covered benefits; and any other services or supports that are medically necessary to maintain or improve the health status of PACE program participants. Nationally, our participants receive PACE services at a capitated cost that is, on average, 16.5 percent less per person, per month, than the costs that state Medicaid programs otherwise would incur to care for these individuals.

We hope you and your staff will be able to join us and see our innovative, person-centered care model in action. Thank you in advance for considering this request.

Sincerely,

NAME
DATE

The Honorable CHRIS DOE
U.S. House of Representatives/U.S. Senate
Washington, DC 20515 or 20510

Dear Representative/Senator Doe:

On behalf of PACE ORGANIZATION and our participants, thank you for taking the time to visit NAME OF PACE CENTER on DATE.

PACE ORGANIZATION and our staff appreciated the opportunity to share the PACE model of care so you could see the positive impact our wide range of services and supports have in the lives of our participants and their families. We look forward to continuing our conversation with you in the future.

Do not hesitate to contact me if I may be of assistance to you or your staff on issues regarding PACE or the participants we serve.

Again, many thanks for your site visit.

Sincerely yours,

NAME
For Immediate Release

Contact: NAME, TITLE, PACE ORGANIZATION, EMAIL ADDRESS, PHONE NUMBER

PACE ORGANIZATION/CENTER NAME Will Host Visit by NAME OF LEGISLATOR

When: DATE/TIME

Where: NAME OF PACE CENTER
ADDRESS

Who: NAME OF LEGISLATOR
ANY OTHER VIPS WHO WILL BE ON HAND
THOSE LEADING THE TOUR

Agenda: (Briefly describe the site visit agenda.)
Date ____________________________________________________________
Legislator _______________________________________________________
Other Attendees ___________________________________________________
PACE Program _____________________________________________________
Address __________________________________________________________
Topics Discussed (Include Any Significant Comments/Feedback from the Legislator)
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

Were any photos taken?  Yes ☐  No ☐
Would you be willing to share them with us?  Yes ☐  No ☐
Did any press attend?  Yes ☐  No ☐
If so, please provide the name of the media outlet: _________________________
Did they provide coverage of the event?  Yes ☐  No ☐
Please share your general thoughts and observations about the visit.
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

Please indicate if there is anything NPA can do to help you follow up with the legislator.
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________
____________________________________________________________________

Please return this completed form to Francesca O’Reilly by email at FrancescaO@npaonline.org.