

2008

Facility Tour Toolkit

TEXAS HEALTH CARE ASSOCIATION





THCA 2008 Facility Tour Toolkit

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Facility Tours Overview

Facility tours with policymakers and political candidates are an essential component to long term care advocacy outreach efforts. They provide facilities with the opportunity to discuss and showcase complex issues directly with the political leaders who are able to impact change and demonstrate your commitment to the frail, elderly and disabled populations we serve.

Nothing promotes a story better or more effectively to policymakers (and media) than having them observe first-hand the hard work and dedication to patient care taking place at THCA facilities throughout the state.

Facility tours are an effective way to educate target audiences on what goes on “behind-the-scenes” as our patients receive quality care each day. The tours are an excellent way to:

- Garner political support and media interest in our issues;
- Visualize the necessity of quality care for patients;
- Introduce elected officials to the quality improvements taking place in Texas nursing homes;
- Speak with our residents directly as they are being cared for in our facilities; and
- Speak with designated medical staff and caregivers within the environment they work.

WHY NOW

Any time is a good time for a facility tour, but with 2008 elections quickly approaching, now is an ideal time to elevate long term care issues as part of the larger political discussion on how to improve state and national health care issues.

As candidates are meeting with constituent groups and voicing their positions on a wide range of issues, now is an opportune time to offer a briefing with caregivers, patients and the media to express our concerns about existing health care policy and discuss solutions for improving long term care in Texas and beyond.

With new candidates in particular, policymakers must be educated on the issues important to long term care. Key decisions will be made this year that could have an extraordinary impact on THCA providers and the patients we serve.

HOW

There must be a set system in place to ensure that invitations for tours, initial contacts, follow-through and planning are organized to avoid any overlap, omissions, or general confusion.

First and foremost, THCA will keep a master tracking grid of who is being reached out to and by whom. It is imperative before you reach out to a policymaker or candidate that you circle back with Leticia Caballero (512-458-1257 or lcaballero@txhca.org) to let her know that you are extending a facility visit invitation to a candidate or elected official. There may be a relationship with this individual within THCA you are unaware of that could help secure interest of a particular candidate and his or her staff.



The following steps outline the process THCA encourages when arranging facility tours. Where noted, templates/samples of process components are included within the following sections of this toolkit.

STEP 1: INITIAL CONTACT

An invitation to the candidate is typically achieved in one of the following ways:

1. Invitation (written or in person) from the executive director of THCA
2. In-person invitation from lobbyist with accompanying invitation in writing or as follow-up
3. Invitation from select administrator with a personal contact

Again, it is important to let THCA know who you are reaching out to in order to avoid multiple facilities reaching out to the same candidate.

STEP 2: INVITATION FOLLOW-UP

Follow-up is just as important as the initial outreach. Political candidates are incredibly busy, and it's important to make sure they have received their invitation.

Follow-up is typically done in one of the following ways:

1. Lobbyist follow-up with candidate office
2. THCA follow-up with candidate office
3. Facility administrator follow-up with candidate office

If interest is secured, it is time to move onto "Step #3."

STEP 3: INTEREST SECURED

If the facility would like the event to be managed by Schmidt Public Affairs, the following procedure should be followed:

1. Communications counsel (Schmidt PA) is alerted and follows up with the candidate's scheduling office or assigned contact communicated to SPA by lobbying counsel.
2. SPA will work with the press secretary or communications director to coordinate details of events (in coordination with the host facility).
3. SPA helps to draft and personalize candidate remarks, script entire event.



4. SPA offers to help personalize news release and quotes, distribute to and invite local media (*template news release included in toolkit*).

STEP 4: EVENT EXECUTION

The following tasks are the responsibility of the facility hosting the candidate visit:

1. Serves as host for event
2. Provides equipment needed for event (seating, podium, microphone, etc.)
3. Provides snacks and beverages if necessary
4. Identifies staff/residents that will work with SPA staff to serve as participants in tour
5. Recruits a spokesperson (Owner, Facility Administrator, Family Member)
6. Invites local community leaders, area long term care providers, and other interest third parties
7. Collects RSVPs from candidate staff and other invited guests

The following tasks are the responsibility of SPA:

1. Determines with THCA if ground staff is necessary
2. Develops detailed agenda or “run of show” for visit and line-by-line for candidate staff (*sample run of show included in toolkit*)
3. Coordinates with THCA to determine the most appropriate facility depending on candidate relationships and intended results
4. Coordinates with the facility administrator to identify the most appropriate spokespeople, agenda for the visit
5. Drafts remarks for individuals involved in the program, tailors talking points and “message trains” event participants (*sample talking points included in toolkit*)
6. Creates briefing kits, media kits (if applicable), signage
7. Prepares all press materials, media advisory and press release (*template media advisory and press release included in toolkit*)
8. Manages media outreach, if applicable



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9. Distributes press release, sends out via newswire
10. Provides facility with award/recognition for candidate, if applicable, in advance
11. Monitors, collects and distributes media coverage following event

WHAT HAPPENS AFTER THE EVENT

Please send a thank you note to the candidate thanking them for their time and restating what was discussed during their visit. This is one more way to go over key points/issues on long term care.

Continued communication is KEY even following the event. It is important to take the time to follow up with the candidate's office, and keep him or her abreast of the latest issues/concerns of the industry.

THCA will alert its members of major developments with Medicaid and other pressing policy issues and will share these updates with facilities to pass along as follow-ups when appropriate.



Sample Invitation Letter

Date

The Honorable First Name Last Name

Address

City, State, Zip

Dear Representative/Senator Last Name:

Texas' aging population will present federal and state governments with health care challenges unmatched by previous generations of retirees. The mounting number of Texans requiring long term care services, and an under funded Medicaid system put access to quality long term care services for the elderly and disabled at risk.

Medicaid, a joint state-federal financing responsibility, must be properly funded to ensure consistent, quality care for our frail and disabled Texans. The current Medicaid rate in Texas is approximately \$106, nearly \$50 below the national average, which means our state ranks 49th in the nation for Medicaid reimbursement rates. This is an astonishingly low figure that leaves health care providers unable to meet the growing complex care needs of patients, vulnerable seniors uncertain about their ability to access health care and state government strapped with the financial burdens of an aging population.

We are asking [NAME OF CANDIDATE] to support Texas seniors and work with us to properly fund the state's Medicaid system to adequately provide for Texas's seniors, now and into the future.

I'd like to invite you to visit our facility, [NAME OF FACILITY], to see first-hand the quality care we are providing for some of Texas's elderly and disabled. [NAME OF FACILITY] is home to more than [#] frail, elderly and disabled residents who require around-the-clock skilled nursing care. The doctors, front-line caregivers and staff at our facility understand the enormity of the responsibility on our shoulders – to maintain and improve quality care for our residents now and for the patients we will care for in the coming years.

I can work with you to find a date and time, at your convenience, to visit with our staff and residents at our facility. We look forward to discussing your ideas that provide sustainable funding that is critical to the patients, family members, caregivers and staff at [NAME OF FACILITY].

Sincerely,
FACILITY ADMINISTRATOR

Note: When sending this letter to a candidate (not a current officeholder), it is not necessary to address them as the Honorable, or use the titles State Representative/Senator in the salutation.



Sample Run of Show

Administrator

Emcee/Welcome/Intro to Senator/Rep/Candidate

Good morning. Thank you for joining us today and being part of this important event to discuss long term care and Texas' need to support the frail and disabled citizens of this state.

My name is [NAME OF ADMINISTRATOR]. I am [TITLE] of [NAME OF FACILITY], a skilled nursing facility in [CITY/TOWN] that is home to more than [#] elderly and disabled residents. Our facility is committed to providing the highest quality care to our residents, and we need the support of our elected officials to ensure that all long term care facilities across the state have the resources necessary to meet the needs of the patients we serve.

I am honored to be here today on behalf of my peers and colleagues in the health care community – as a voice for the elderly and disabled patients we represent – to ask our representatives in Austin and Washington to help increase Texas's current Medicaid reimbursement rate, which ranks 49th nationally compared to reimbursement rates in other states.

Our community is aware of the potential crisis at hand and our mission today is to let lawmakers and the public know, on a more personal level, that Medicaid is currently underfunded by \$4.4 billion nationally. During the last legislative session, the Texas Health and Human Services Commission estimated that Texas Nursing Homes were under funded by over 19%, or \$342 Million. The current reimbursement rate paid to Texas nursing homes is \$106 per day per patient – \$50 below the national average. I must also note that this translates to \$4.42 per hour per patient, less than the national minimum wage amount – for patients that require skilled, personalized, medical care 24 hours a day, 7 days a week. This is unacceptable and must be corrected.

This is an especially important time in which to raise this key policy issue: The 2008 elections are in full swing and we must call upon candidates, on national and state levels, to focus on the



needs of our aging population and offer comprehensive, realistic solutions to the current long term care funding crisis.

Our facility is proud to join with the Texas Health Care Association, representing thousands patients and caregivers across Texas, in an effort to raise awareness about the need for increased Medicaid funding. Lawmakers must amend the insufficient Medicaid rate that severely impacts our patients, significantly undercuts the efforts of our facilities, and without a doubt, undermines the federal, state and profession-wide quality improvement programs so many of us are now successfully involved in.

In recent years, our facility has a made a number of quality improvements to better the lives of our patients, including [LIST RECENT QUALITY IMPROVEMENTS]. The linkage between payment stability and quality improvements is unmistakable, and our goal is to make certain that numbers and balance sheets must never take precedence over the well being of real people with growing complex care needs.

[NAME OF CANDIDATE OR POLICYMAKER]'s presence today as well as [HIS OR HER] support and recognition of the importance of adequate Medicaid funding for seniors is invaluable to our patients, staff and other members of [CITY/TOWN]'s long term care community. We thank you for recognizing the hard work, accomplishments and dedication of this community.

Now, it is my honor to introduce our special guest, [NAME OF CANDIDATE]. We are honored to have you here today..... *(Welcome candidate to podium).*

-- CANDIDATE REMARKS --

Administrator: Thank you, [NAME OF CANDIDATE]. Our next speaker is a devoted and cherished member of [NAME OF FACILITY]'s caregiving staff. *(Share some personal info about the caregiver.)* It is my pleasure to introduce [NAME OF CAREGIVER].... *(Welcome caregiver to podium).*

Caregiver: Thank you, [NAME OF ADMINISTRATOR]. Good morning. My name is [NAME OF CAREGIVER] and I am a [CNA/LPN/RN] at [NAME OF FACILITY]. I have been a long term



caregiver for more than [#] years. (*Tell short story about why you like working with the long term care community.*)

I am here today to represent the front-line caregivers like me who are dedicated to providing quality care to my residents, whom we all regard as practically family members, not just statistics.

When I learned of how Texas's long term care facilities rank in Medicaid reimbursement as compared to the rest of the nation, I immediately thought of the needs of my patients. At a time when facilities are struggling to implement ongoing quality improvements, it makes no sense to provide us with inadequate funding that can't even cover the basic costs of patient care.

Residents are not the only members of our community impacted by inadequate Medicaid funding. When sacrifices are made in a facility due to budgetary constraints, staff is usually the first to feel the impact and our jobs become much more difficult when facilities are forced to encourage longer shifts and workweeks. High turnover, often attributed to low wages, is a widespread issue in nursing homes across the state of Texas.

That's not good for caregivers and it's not good for our residents. One of the key elements of quality care is the ability of a facility to attract and retain qualified staff. We can't do that without ample funding. Period.

The bottom line is that deficient Medicaid reimbursement restricts the ability of providers to hire, train and retain the most qualified caregivers, responsible for the most intimate care needs of our patients, and who make the key difference in care outcomes.

We are counting on our leaders in Austin and Washington to not only increase current Medicaid funding for long term care, but also work together to overhaul today's broken system so that tomorrow's seniors are guaranteed the quality care they deserve.

Administrator: Thank you, [NAME OF CAREGIVER].



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Before we conclude today, I want to thank you all for joining this effort and we look forward to working together to ensure that Medicaid funding for our aging population is secured.

As Texas, our nation and our profession itself faces the retirement of more than 77 million baby boomers, we must work with our state and national leaders to guarantee adequate funding for long term care so that we can maintain quality improvements and continue to meet the needs of the patients we so proudly serve – today and in the years ahead.

Thank you to all for attending.



Template Media Advisory

MEDIA ADVISORY*

**[CANDIDATE NAME] Tours [FACILITY NAME] –
Caregivers and Residents Discuss the Critical Importance of Medicaid
Funding for Maintaining Quality Long Term Care**

***Texas Ranks 49th in the Nation in Medicaid Reimbursement for Nursing Home Care: Long
Term Care Community Stresses that Strengthening State Medicaid is Vital for
Maintaining Quality Care and Creating Future Long Term Care Improvements***

[FACILITY CITY] – On [DATE], [CANDIDATE NAME] will tour [FACILITY NAME] following a meeting with facility leaders and front-line caregivers on pressing long term care issues, such as the need to increase Texas Medicaid’s funding to ensure ongoing quality care improvements. After the tour, [CANDIDATE NAME] will address caregivers, residents and family members on [his or her] ideas for improving health care for Texas’s seniors.

What: [FACILITY NAME] caregivers will explain how Texas’s low average daily Medicaid reimbursement rate per patient – \$106.59 compared to \$153.83 nationally – negatively impacts patient care delivery and quality improvements, and [CANDIDATE NAME] will share [his or her] thoughts on strengthening long term care and health care delivery for all Texans.

Who: AAAA [Candidate Name]
BBBB [Facility Administrator]
CCCC [Facility Caregiver Representative]
DDDD [Additional Area Thought Leader, if applicable]

When: [TIME, DATE]

Where: [FACILITY NAME]
[ADDRESS]

Why: Texas ranks 49th in the nation for Medicaid reimbursement. It is critical that this funding for Texas nursing homes is increased in order to ensure consistent care and services, create adequate financing and payment stability and help prepare as more Texans are living longer and will eventually need long term care.

Contact: [NAME] at [PHONE] or [E-MAIL]



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Template Press Release

FOR IMMEDIATE RELEASE:
[DATE]

CONTACT:
[NAME, PHONE NUMBER]

[CANDIDATE NAME] and Long Term Care Community Discuss the Need for Increased Medicaid Funding to Maintain Quality Long Term Care in Texas

In Tour and Briefing at [FACILITY NAME], [CANDIDATE] Shares Ideas for Strengthening Long Term Care and Health Care in Texas and Nationally

[FACILITY CITY] – [DATE] – In a briefing with [FACILITY NAME] caregivers, residents and their family members today, [CANDIDATE] warned that without properly funding Texas’s Medicaid nursing homes the state will continue to fall behind the nation in delivering quality long term care, and shared his/her thoughts for strengthening health care delivery for Texans of all ages.

According to recent data, Texas’s Medicaid reimbursement rate for nursing homes has slipped to 49th in the nation. Additionally, Texas seniors receive \$106.59 on average per patient per day, while the national daily average is \$153.83 per patient. To address these concerns, [FACILITY NAME] hosted [CANDIDATE] for a briefing with front-line caregivers and patients to examine how to improve the state’s standing in delivering quality long term care.

[INSERT CANDIDATE QUOTE HERE... COULD INCLUDE COMMENT ABOUT THE NEED TO MAINTAIN QUALITY LONG TERM CARE AS TEXANS ARE LIVING LONGER AND WILL EVENTUALLY NEED LONG TERM CARE SERVICES; IT’S TIME FOR NEW IDEAS; ETC.]

Caregivers at [FACILITY NAME] pointed out that a dialogue on Texas’s long term care delivery system is needed to make this issue a broader part of the state and national health policy debate. At the national level, the National Commission for Quality Long Term Care (NCQLTC), headed by former U.S. Senator Bob Kerrey (D-NE) and former House Speaker Newt Gingrich (R-GA), recently found that most Americans do not understand the nature of long term care



funding – with 34 percent believing that most long term care is paid for by Medicare, 20 percent thinking it is paid for by Medicaid, 22 percent believing that individuals and their families pay for most long term care and 13 percent saying they do not know at all how long term care is financed.

[INSERT FACILITY ADMINISTRATOR QUOTE HERE... COULD INCLUDE COMMENT ABOUT THE NEED FOR PEOPLE OF ALL AGES TO UNDERSTAND THE SERVICES AND QUALITY CARE THAT LONG TERM CARE FACILITIES PROVIDE; HOW THE LONG TERM CARE COMMUNITY IS READY TO BE PART OF THE HEALTH CARE SOLUTION; ETC.]

In addition to discussing Medicaid funding, [CANDIDATE NAME] also touched on his ideas for improving X, Y and Z as part of his campaign. For more information on [CANDIDATE NAME] and [his or her] platform, visit [WEBSITE].

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About [FACILITY NAME]:

[INCLUDE BASIC INFORMATION ABOUT THE FACILITY HERE: TOWN IN WHICH IT IS LOCATED, HOW LONG IT HAS BEEN IN OPERATION, HOW MANY PATIENTS IT SERVES, WHAT TYPES OF SERVICES IT PROVIDES, ETC. – INCLUDE WEBSITE IF APPLICABLE]



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