

# ***THE CHAPTER DISPATCH***

**December 2006**

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## **AT A GLANCE – Important Dates**

### **2007 CALENDAR**

**December 28 Conference Registration Begins**

**January 15 IRS Reports Due**

**January 15 Treasurer Reports**

**February 14 CMOY/AOSE Award Nomination Deadline**

**June 19-23 17<sup>th</sup> Annual Conference Denver, CO.**

### Communities of Practice

If you have not yet explored and taken advantage of CMSA's Communities of Practice, you should to set up your web Profile today and get started. CoP's are powerful tools that help you keep up to date with changes in the CM field. Increasingly CoP users turn to one another online for support, new ideas, and information. Since face-to-face interaction or communication by telephone is not always convenient or possible, you'll save time, money, and effort when you become active in a CMSA CoP! There is a lot of valuable information that can be used as resources to help both the case manager. Encourage your membership to take advantage of this valuable member only benefit!

Why Be a Part of CMSA's Communities of Practice?

- Network with your peers for solutions and ideas
- Share best practices that you've learned on the job
- Problem-solve
- Find links to useful sites for resources and industry news

Each online community consists of a group of individuals who have a shared purpose and common interests. CoPs are organized around these common interests and practice settings:

- Acute Care/Hospital Case Management
- Disease Management
- Entrepreneurs/Business Owners
- Integrated Care Management
- Public Policy
- Managed Care
- Post-Acute Care (*Elder Care, Home Care, Long-Term Care & Rehabilitation*)
- Social Work/Behavioral Health
- Workers Compensation/Occupational Health
- Academic - Evidence Based Practice (*by invitation only*)

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**CMSA is dedicated to bringing members like you tools you can use in your career, as well as those needed to address specific life needs. CMSA is dedicated to equipping you for success in all areas of your life.**

### Public Policy Communities of Practice Online Forum

CMSA developed a Legislative Council in Spring 2005 as a grassroots committee to begin learning about health policy and how CMSA can become more knowledgeable and educate members on issues going on in today's healthcare industry, particularly case management. In these efforts, one of their recent goals has been accomplished – to bring CMSA members a means of sharing knowledge and seeking involvement! **CMSA has added the Public Policy Communities of Practice to their list of CoP's.** This online forum allows members to open discussions, share articles and files, link websites and participate in polls. This feedback will be useful to not only the members, but also the Legislative Council to determine member needs, interests and resources needed to help our members become more educated on the legislative process and involvement. If you've not yet been on the CoP, please create your User Profile and begin today! You can find the CoP at [www.cmsa.org](http://www.cmsa.org) under Membership. Once on the CoP pages, you will create another Profile just for these pages as an outside vendor houses them. If you have any questions, please contact Member Services.

## CHAPTER REMINDERS

### Excellence & Innovation Award Program – NEW DEADLINE!

Enter your chapter's best projects in CMSA's 2007 Chapter Excellence & Innovation Awards (CEIA). Entries will be accepted in the five categories Best use of *Technology*, *Conference*, *Educational Programming*, *Membership Development*, and *Print*. **Entries will be taken until February 28, 2007. This is a New Deadline! Entries reflect activities from Jan 1-Dec 31.** Visit [www.cmsa.org](http://www.cmsa.org), click on "Your Career" then on "Awards" to find out more and to download entry forms. Recipients of these awards will be recognized at the Denver 2007 Annual Conference.

### Nominate your local CMOY & AOSE Award nominations

Take a moment to nominate your peer for a Case Manager of the Year (CMOY) award or Award of Service Excellence (AOSE). The deadline is **February 14, 2006**. Each year at the annual conference, CMSA presents these two prestigious awards to members whose case management careers elevate professional standards, enhance individual and leadership performance, and exemplify merit and distinctions. Visit [www.cmsa.org](http://www.cmsa.org) Click on "Your Career" then on "Awards" to download forms and view previous award winners. That special case manager deserves an award, so why not help recognize a deserving CMSA member who has significantly impacted the field of case management. Contact CMOY/ AOSE Staff Liaison Michele Lee at [mlee@acminet.com](mailto:mlee@acminet.com) (501)225-2229

### Your Chapter's Fiscal Period

**All CMSA Affiliated Chapters fiscal year just concluded August 31.** For some of you, this means a time to transition officers. **For all of you**, this means it is time to begin planning and strategizing for the next fiscal year. Financial reports for the past fiscal year should begin being compiled. Budgets costs for the next year should be discussed now. For more information on the financial obligations of the organization, please review the Treasurer's Guide at: <http://www.cmsa.org/PDF/Chapters/ChapterTreasurerGuide.pdf>. This is also a good time to set chapter goals and reflect on past year's accomplishments. **Reports deadline is January 15. Start today!**

### CSC Registered Agent Invoices

In July, CMSA's Registered Agent (Corporation Service Company or CSC) mailed an invoice for services to each affiliated chapter for this next year, beginning Sept 1, 2006 to Aug 31, 2007. Corporations are required by the DC Statute to engage the services of a registered agent. Also, most states require that you have a registered agent when you incorporate within your state, as well. Each chapter is incorporated in DC as a Domestic Corporation but in your state, you would be registered as a Foreign Corporation. Your invoice may reflect services for DC (Domestic) and maybe local (state) fees (Foreign) – if you used CSC for the local agent.

The invoices might have gone to your chapter Treasurer, President, or Executive Director. Please make sure that these invoices are passed along to the proper person for payment and processed to keep the chapter in good standing with DC. This is very important!

## CHAPTER HIGHLIGHTS

To contact any of the local affiliate or pending chapters, visit [www.cmsa.org](http://www.cmsa.org) – under the Membership link choose Chapter.

### Official CMSA Chapters

#### **Birmingham, AL**

The case management society of Alabama, Birmingham chapter held their monthly Lunch and Learn CEU meeting on Nov. 15<sup>th</sup>. Dec 20 the Annual Membership Meeting. A speaker is coming to speak on “How to beat the holiday stress.” Members and non-members are being asked to bring donations to a local organization – Lighthouse Women’s Shelter – as admission to the dinner and speaker. There will be many; many sponsors for this meeting that are bringing door prizes. As well as a sponsor that has sponsored the meal. A power point presentation will be running during the meal that gives our stats on membership, recognizes and welcomes New Members for 2006, and gives information on the upcoming monthly meetings that are Lunch and Learns as well as the upcoming Annual Conference in April. The date of this Meeting is Dec. 20<sup>th</sup>.

#### **Fresno, CA**

The Central California Chapter of the Case Management Society of America is looking forward to a surge of growth in this coming New Year! After having a wonderful Holiday Luncheon that was a huge success we are anticipating even more great things for 2007!

Monthly chapter meetings are on the agenda and there are many items of interest that should generate increased attendance and active membership commitment. On Jan. 31 a morning seminar will be sponsored by the BioClarity company. The role of DNA testing as it relates to genetic predisposition towards chemical dependency from prescription pain medication will be discussed. Two local physicians and speakers from the company will present some very interesting and exciting developments in this area. The complex ethical issues associated with this new technology and treatment protocols will also be addressed. A quality local restaurant or elegant meeting facility venue will give the guests an even more pleasing experience while they learn!

Future plans for the spring include a Luncheon in March where the members fill and bring Easter Baskets to donate to a local charity. This annual event is held at the Spike and Rail Restaurant just off of Highway 99 in Selma, CA and is always a lot of fun for all attendees. April promises a meeting presentation on Elder Care featuring a guest speaker Lori Hickman. Women’s Health Month, May, the chapter will hold a special meeting on May 9 and a large crowd is expected to attend!

It is exciting to see how the Central California Chapter of the C.M.S.A. is growing and developing into an active and vital part of the community. Case Managers meet together, form friendships and professional liaison relationships, and decide to make a positive impact on the care of all we serve. Look forward to seeing a lot of growth and changes from this chapter!

#### **Orlando, Florida**

The Central Florida CMSA Chapter held our 13<sup>th</sup> Annual Vendor Show on November 9<sup>th</sup>, 2006. There were 55 vendors and it was attended by 252 attendees. The theme was Viva Las Vegas. Gifts and prizes were awarded and the Case Manager of the Year was announced. There was even a special attendance by Elvis (well sort of...).

The Annual Christmas Party was held Dec. 14<sup>th</sup>, 2006 with over 100 attendees. Toys were brought by all attendees and donated the Shriners Annual Christmas Party. A great time was had by all!

## **Chicago, IL**

CMSA Chicago had another successful monthly dinner meeting on Dec 5th at Papagus/Oakbrook. Topic presentation: Total Lumbar Artificial Disc Replacement sponsored by DePuy Spine. There were 38 attendees from different managed care companies and hospitals. The next meeting will be on Jan 9th at Braxton Seafood Grill/Oakbrook. Topic: Advancements in Lower Extremity Prosthetics sponsored by Hanger, Inc. The Feb 13th meeting will be at Papadeaux/Arlington Heights. Topic: Upper Extremity Nerve Compression. Sponsor: Athletico.

## **Fort Wayne, IN**

Fort Wayne Indiana CMSA Chapter is planning a seminar titled "Everything you wanted to know about Case Management but were afraid to ask." Debbie Stubbs with Summit Reinsurance will be the presenter. It will be held at the Rehabilitation Hospital of Fort Wayne (located near Lutheran Hospital) on Feb. 20, 2007. 3.5 CEUs will be available.

## **Baltimore, MD**

CMSA of the Chesapeake held an evening dinner program on Nov 7, 2006. Nancy Skinner RN,CCM presented "Improving Medication Adherence and Health Outcomes in Osteoporosis Patients". The chapter would like to thank Roche Pharmaceuticals for sponsoring the evening!

## **Springfield, MO**

The CMSA of Springfield and the Greater Ozarks had its annual seminar on Nov 4<sup>th</sup> with the Vendor fair on the evening of Nov 3<sup>rd</sup>. The seminar was very successful with 57 attendees present. The topic was "Brainstorming" focusing on head injuries, developed by a stroke or traumatic brain injury. The decision to try something new this year by moving the seminar to a hotel rather than in one of the local hospitals was an excellent one. This move seemed to generate more attendance or was it the timely topic?

## **Charlotte, NC**

The triangle chapter of cmsa North Carolina elected to give a contribution in November to the UNC children's network in the amount of \$1500.00. It is always a great feeling to be able for our organization to give back to the community.

## **Woodbridge, NJ**

Through heavy rains, area flooding and traffic issues NJCMSA had its' November meeting. Medtronic Diabetes, Inc. presented 2.4 CEU's to about 100 attendees on "Diabetes and Intensive Management: Understanding the Conditions and Application of Continuous Glucose Monitoring and Insulin Pump Therapies." In addition, to the two presenters there were 7 exhibitors. The feedback from the session was very good.

As part of the continued follow-up on ways to distress, the chapter raffled off prizes that had a "spa theme" such as candles, music, and soaps. Rather appropriately, all attendees received a "rubber duckie" dressed in various Thanksgiving attire.

Wishes go out to all for a Happy Holiday!

## **Long Island, NY**

The Long Island chapter held it's annual fall evening conference Oct 18 at the Westbury Manor with over 115 attendees! Stefani Daniels, RN was the keynote speaker presenting, 'Demystifying Case Management' sparking lively interactive exchanges with the audience! Jim Snack presented 'The Magic of Change: Moving from Fear to Wonder', a captivating blend of magic and message. A variety of vendor's educational presentations added to the diversity and scope of the offerings.

The Dec 6 meeting, to be held at the Huntington Hills Center for Rehabilitation and Nursing, will be a presentation by Dr Semel of St Charles Hospital on innovations in acute rehabilitation. The chapter board of directors will meet Nov 15 to plan the 2007 calendar of events, begin nomination activities, and evaluate the past year of activities and growth.

### **Hudson Valley, NY**

*Happy Holidays to all and to all a wonderful New Year!!* The Hudson Valley Chapter of CMSA wishes all of their members a happy holiday season and a joyous New Year.

The chapter board and many members made a successful journey to the NY Capital District on November 30 to host their northern New York partners in the Case Management profession. Held at the spectacular Desmond Hotel, we were fortunate to present the topic, “An Introduction to Prosthetics and Orthotics for the Case Manager”, sponsored by Hanger Orthotics. Case Managers and Social Workers from all settings attended this well-received session and had the opportunity to meet actual clients. It was a great opportunity to network, brainstorm, make new friends and recruit new chapter members. The chapter would like to extend a special thanks to Hanger Orthotics and their guest speakers for sponsoring this great evening.

Our annual holiday excitement opened with a bang for the Hudson Valley Chapter of CMSA! The holiday celebration on December 6, 2006 was a return to our favorite spot, “Sam’s of Gedney Way” for a spectacular celebratory dinner. Larry Gibbs, REMT-P of Air Trek Ambulance, presented the exciting topic of “Principles of Air Medical Transport”. Co-sponsored by Cheryl Scanlan at “One Source” for Pharmacy and Home Care services, it was a fabulous meeting! The lucky winner of the monthly new member raffle received a holiday gift, as did all of the attendees who received a Hudson Valley chapter CMSA monogrammed sports bag as a thank-you for their continued support. Biscotti table centerpieces were also raffled off to many lucky attendees and everyone enjoyed a delicious buffet dinner.

Please join us at our next chapter meeting on February 7<sup>th</sup>, 2007, sponsored by IMED with location to be announced. And remember, CMSA members always attend HV-CMSA meetings free with advance paid registration! For all future Hudson Valley CMSA events, please frequently check out the website at [www.hvcmsa.org](http://www.hvcmsa.org).

### **New York, NY**

The CMSA-NYC Chapter has successfully started the schedule of chapter meetings in September, with the second annual dinner cruise to the Statue of Liberty and back. Cotherix provided an excellent program on Pulmonary Hypertension with an outstanding guest speaker. The program was followed by dessert and dancing to a DJ. What a fun way to network and add CCM’s to your resume! This was the second annual cruise and registration was once again, sold out.

In October the chapter had a half-day conference entitled “Desperate Case Managers.” Most of the CMSA-NYC Chapter members commute to work from outside the city. Past attempts to have people return to New York City on the weekend for an all-day conference were not well received. Additionally, many employers are either limiting or totally omitting financial reimbursement for educational meetings. The conference was held on a Wednesday and ran from 3 to 9:15 p.m., with an open exhibit hall. There was a panel discussion with representatives providing the managed care organization prospective, as well as the patient-focused hospital prospective. The dinner speaker covered issues that make case managers desperate, and ways to deal with stress. The closing speaker provided an overview of current legislation that is affecting case management. The conference was held at the Marriott Hotel at Times Square, a central location with reasonable access to public transportation. The primary goals of the CMSA-NYC Board of Directors were to make the conference available to our members at reasonable cost; to limit the amount of personal time off required for attendance; and to provide a significant number of CCM’s/CEU’s. All of the goals were accomplished, and the response from the attendees was overwhelmingly positive.

A mailing to the membership is being prepared to obtain updated email and telephone contact data, since most member communications are sent via email, with telephone outreach, as necessary. Many members list work contact data when they register with CMSA. So, when they change jobs, their contact data is no longer valid. The mailing will include a survey to solicit feedback on the best days of the week and times for future conferences, as well as suggested topics for future meetings.

On Dec 5, an attorney from Stonybrook University Medical Center will speak on *Healthcare and Legalities- New Laws Affecting You and Your Patients*. This meeting is the chapter holiday celebration. In addition to the presentation, the Board has planned a fun-filled evening for the membership, with holiday favors and numerous prizes to be won.

### **Chattanooga, TN**

The Chattanooga Chapter celebrated National Case Management Week on Oct 10 featuring Kathleen Lambert RN, BSN, JD, Attorney at Law from Tucson, Arizona. Kathleen spoke on "*Values, Ethics and the Law for Case Managers*." She brought a sense of humor into the perspective of our personal and professional values, the principles, and characteristics of ethics and the "law" of the jungle for nurses and case managers.

The Chattanooga Chapter of Case Management had their November meeting Nov 14<sup>th</sup>. The speaker was Alyssa Swanson, BS, RN, CEDE, CCM (past president of the Chapter) who spoke on "*Understanding Insulin Resistance: Knowledge to 'Empower' Prevention of Type 2 Diabetes Mellitus*". The meeting was sponsored by Sarnoff-Adventism. The next meeting will be held on Dec 12.

## Leadership Tips

### Succession Planning and Future Leaders

#### Characteristics of an Effective Succession Plan

- Goes three years out
- Outlines information transfer
- Includes contingency planning
- Includes mentoring
- Provides "career path"/road map for chapter leadership
- Instills enthusiasm and fun
- No twisted arms
- Has support from past leaders
- Draws from a pool of qualified, credible candidates

#### Barriers to Effective Succession Planning

- Volunteer Burnout
- Significant time commitment
- Succession plan is last minute
- Lack of training
- Loss of momentum
- Not enough people in the pool
- Don't articulate value of leadership
- People get stagnant or in comfort zone and won't give up position
- Life changes - family commitments, babies, job changes, transfers
- Haphazard - each leader recruits successor and the effort isn't coordinated
- No one person is accountable
- Lack of employer support

#### Identification and Training of Potential Leaders

- Create a leadership institute - open to all members; provided at no cost; multiple sessions (6-8); covers various aspects of chapter leadership and leadership in general
- Provide professional development for board and committee members, covering topics such as facilitation, meeting management, etc.
- Strong committee structure
- Use member meeting evaluations to gather names of people who are willing to volunteer. Follow up quickly.
- New member orientation
- New member contacts directly from president/senior leadership
- Board buddies - executive board support for others
- Have a Director of Volunteers
- **ASK, ASK, ASK**

### So We Need a Committee - Let's Make it the Best!

Two key procedures to achieve the best committee are:

#### **Selection**

Selecting committee members is most effective as consideration can be given to skills, interest and size of the group. Five to nine people on a committee is the best for most situations.

#### **Orientation**

The Committee Chair orients the members as to the purpose of the committee and expectations of the organization. Structure of the organization, reporting procedure, roles and responsibilities are clearly defined. Individual member's expectations should also be brought out at this time.

The Committee Chairman is the "key leader" of all committee work. This person should be selected after careful consideration by the organization. Choose someone who is interested and can work easily with others. The Chair's role is not necessarily one of bringing technical expertise to the group. The fact that a person is a good membership recruiter does not mean that he or she will be good at chairing the membership committee. The Chair must be organized and know how to organize both programs and people. He or she must know how to involve others - the experts and the workers, and to motivate them to do the work of the committee.

#### **Other Responsibilities of the Chair include:**

- preparing and presenting committee reports to the organization
- ensuring that a successor is "groomed" to assume the chair's role sometime in the future
- setting agendas, calling meetings, soliciting input from all members

The chapter board must orient the Committee Chairman - do it honestly! "Take the job. There's nothing to it" - is unwise, unproductive and untrue!

#### **Signs of a Good Committee Functioning Well**

- Purpose of the committee is clear to all.
- Careful time control: length of meetings, as well as development of overall committee time path.
- Sensitivity within to each other's needs; good communication among all members.
- An informal relaxed atmosphere.
- Good preparation on part of the chair and members.
- Interested, committed members.
- Minutes are complete and concise.
- Periodic self assessment of committee's performance.
- Recognition and appreciation are given to members so that they feel they are really making a contribution.
- The work of the committee is accepted and makes a valuable contribution to the organization.

## ADVOCACY & POLICY

### What is Advocacy?

We often toss around the term "advocacy" as if we all had a clear understanding of what is meant by the term or what it means to "do advocacy." Particularly in a group of self-proclaimed "advocates" or among folks who consider themselves professionals in the field, little attention is paid to defining the term, as if everyone meant exactly the same thing; as if all advocates fought for the same cause or pursued the same results.

And while advocacy is a relatively simple activity, the term often carries with it a certain mystique. Sometimes we think that it must take something extra special to do this thing called advocacy and that, whatever it is, we must certainly lack that which is required to do it.

### In actuality, advocacy is as basic as breathing.

The word itself comes from the root vocare: to call. Webster gives us a fine place to start when defining "the advocate:"

1. a person who pleads another's, or one's own, cause
2. a person who speaks or writes in support of something

**Advocates call for justice, fairness, equality, more or less of something. They explain, translate, convince, argue, articulate, remind and direct change in thought, policy and action.**

**"Advocacy is the EDUCATIONAL process through which data, EXPERIENCES and insight are shared with those who craft PUBLIC POLICY so that they may make informed decisions.**

### What is Policy?

#### Policies have three things in common:

1. **Policy is Written:** This is particularly true regarding public policy. Policies must be written down. They may not exist in a clear and concise "policy statement," but policies can be discerned from rules, laws, guidelines and regulations.
2. **Policy is Approved by Legitimate Authority:** In a family, the "legitimate authority" is most likely one or both parents. For a corporation or a nonprofit, it's usually the board of directors. The "legitimate authority" for local, state, and federal government is divided between elected and appointed officials in administrative, legislative, and judicial branches. They approve policies, though citizens can have substantial input in creating them.
3. **Policy is a Guide to for Further Action:** Policies determine a general direction or course. For example, if the leaders of a local Housing Authority set a policy to refrain from constructing new affordable housing units, most of their activity may be directed toward the construction of "market rate" units or the rehabilitation of existing structures. When we want an institution or a government to follow a different course, we advocate for a change in policy direction.

### Who Makes Policy?

In order to know where to most effectively direct educational advocacy efforts, it is important to understand how public policy is made. At all levels of government the basic policy responsibilities are divided into:

1. **legislative policy** that sets parameters for funding authority and goals for legislation;
2. **administrative policy** that sets regulations and guidelines once laws are made; and
3. **judicial policy** that interprets legislative and administrative actions.

The legislative responsibility at the federal level lies with Congress. At other levels of government the title of the legislative body may vary, but in general,

- the equivalent at the **state level** would be the **State Legislature**,
- at the **county level** the **County Commission**, and
- at the **city or municipal level** the **City Council**.

Each level of government also has its executive/administrative branch including the elected leader (President, Governor, Mayor, etc.) and appointed or employed administrative staff.

#### **Why is it important to understand these distinctions?**

- Different policy is determined at different levels.
- Asking the executive branch to change legislative policies may not only waste energy, but could alienate potential friends and supporters.
- Directing requests to the legislative branch for changes in specific regulations that were determined administratively, rather than legislatively, can also be unproductive. Advocacy should consist of educational efforts judiciously directed to the people who have influence over the decisions and policies in question.

It also helps to know that **those who work for the legislative and executive leaders** often have a great deal of influence on how policy is made, especially with regard to how policies and legislation are written. **Developing good working relationships with legislative aides or administrative staff can be a very productive use of time.**

**DIRECT INTERACTION:** In terms of direct interaction with policy-makers, there are several strategies useful for individual case managers.

- **Don't Wait - Start Now:** A basic principle from the "friendraising" approach is that you should not wait until there is a problem or even a particular issue to address before getting to know your legislators or the appropriate administrators at all levels of government.
- **Schedule a Visit:** An introductory visit just to let the person know about your project - what services you provide, where you provide them, who your clients are, etc. - will lay the foundation ahead of time for a helpful response when you need to contact the person regarding a particular problem or issue.
- **Issue an Invitation:** Even more effective than visiting the policy-maker's office is inviting that person to tour your project. Seeing first-hand what you do will leave a stronger impression than even the most compelling fact sheet or beautiful brochure.
- **Subsequent contact** with a policy-maker's office may then be either in person - group visits from staff, clients and board members are effective with legislators - or through phone calls, letters or faxes. Some of this contact may be the result of an individual project's issues, or in response to action alerts sent out by local, state or national advocacy groups.
- **Develop a System:** With regard to the latter, it is helpful to have some kind of network in place for responding quickly to such alerts. Phone trees, fax trees, etc. are common approaches to moving the information quickly and allowing for a rapid response to breaking issues.
- **Testify:** Case managers may also be asked to provide their expertise during the legislative or rule-making process. This could entail testifying in front of a legislative committee or at a regulatory hearing.
- **Draft Legislation:** If you have a good working relationship with legislative or administrative staff, you may even be asked to assist with drafting legislation or regulations, or to review and comment on drafts before release.

Adapted from National Health Care for Homeless Council 'State and Local Advocacy Manual' located at [www.nhchc.org](http://www.nhchc.org).