An Advocacy Toolkit
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**OUR MISSION**

To advance the distinctive philosophy and practice of osteopathic medicine.

Serving as the professional family for more than 151,000 osteopathic physicians and medical students, the AOA works to advance the distinctive philosophy and practice of osteopathic medicine.
Welcome! The American Osteopathic Association (AOA) is excited to bring you the second edition of the Advocacy Toolkit that illustrates how the AOA engages in Public Policy advocacy and how you can help support legislation that strengthens the physician workforce and helps us care for our patients. This Toolkit is designed to educate and inform you on the basics of advocacy including:

- Political Science 101
- How a bill becomes a law
- How to influence
- And much more

Public policy directly impacts how you run your practice and how your patients get their care. Federal laws and regulations determine how much you are paid for the care you provide, the administrative paperwork you are required to fill out, or if your patients’ insurance will even cover the care you provide. That’s why it is so important to engage in advocacy at the federal level if you’re concerned about your patients’ care or the future of your practice.

Our goal is to give you the tools you need to succeed in advocating for your patients and your practice. We hope that by the end of this guide you’ll have the foundation you need to reach out to your members of Congress and advocate for the issues that are important to you as an osteopathic physician.

The AOA works diligently on your behalf in promoting the osteopathic philosophy and pro-physician legislation on Capitol Hill. Each day, AOA staff represents you on Capitol Hill through:

- **Federal Lobbying**: We directly engage with lawmakers to advocate for policies that support the osteopathic profession.
- **Regulatory Advocacy**: We study and evaluate regulatory proposals that could impact the profession, submit comments to federal agencies, and engage directly with federal agencies’ leadership to promote our goals.
- **Osteopathic Representation on Federal Advisory Committees and Panels**: We regularly submit nominations and help create opportunities for DOs to share their unique perspective on federal advisory committees and panels.
- **Participation in Coalitions**: Advocacy is most effective when large groups representing the same interests or point of view collaborate. We work with a wide range of partners in the health care field to amplify our voice.
- **Campaigns**: The American Osteopathic Information Association supports the campaigns of candidates who will further our profession’s goals and values.

In addition, the AOA also hosts DO Day on Capitol Hill, which is a valuable opportunity for you to educate your members of Congress and their staff about the pivotal role osteopathic medicine plays within the U.S. health care system.
YOUR ROLE IN ADVOCACY

Even though the AOA works on your behalf every day, future victories won’t happen without your voice. You are the best advocate for the osteopathic profession and your elected officials must hear from you. Your experience and first-hand knowledge, whether you’re an osteopathic medical student, resident, or 20 years in practice, can help guide lawmakers at all levels of government craft impactful health care legislation.

“While you may have an umbrella organization that is based here in DC that coordinates things, make sure you bring constituents to the offices...When you hear a familiar city or even a familiar name from a particularly active constituent, that helps resonate with the congressman or congresswoman.”

– Rep. Donald McEachin (D-VA-4)

Your role in advocacy can be performed in a variety of ways such as emailing, calling or visiting your member of Congress to discuss legislation that impacts you and your patients. At home, you can engage in town hall meetings, visit district offices, or even invite your members of Congress to your practice.

HOW AOA POLICY IS SET

AOA policy is set at the annual House of Delegates meeting where DOs and medical students gather to adopt policy and elect officers. The delegates, who make up the House, are elected by state, specialty, student affiliates, and other stakeholders. Resolutions come to the House of Delegates from several sources, including:

- The President of the AOA
- AOA Board of Trustees
- AOA Bureaus, Councils, and Committees
- State and Specialty Affiliates
- Student Osteopathic Medical Association

Submitted resolutions are reviewed reference committees before going before the House. Delegates then vote on whether or not resolutions should be adopted as AOA policy.

Based on the policies set by the House of Delegates, a sample of our priorities on Capitol Hill are below:

- **Strengthening the Physician Workforce**
  - Strengthening a physician-led health workforce
  - Increase graduate medical education funding and expand student loan repayment programs

- **Access and Affordability**
  - Preserve essential benefits coverage
  - Promote network adequacy
  - Promote opioid alternatives for pain management

- **Entitlement Reform**
  - Ensure sufficient federal funding to support Medicare benefits and Medicaid expansion as currently available

- **Funding Priorities**
  - Support federal funding for public health programs
  - Support funding for the National Institutes of Health

- **Regulatory Reform**
  - Reduce regulatory burden
  - Support changes that provide greater flexibility in service delivery

Do you want to make a change to AOA policy? Be sure to stay involved with the AOA or your state or specialty affiliate to have your voice heard.
POLITICAL SCIENCE 101

Before you look to advocate on behalf of your profession, it’s important you understand the intricacies of Capitol Hill. We talk about committees, bills, and budgets – but how exactly does a bill become a law? Who are the people passing legislation that affects your practice and patients? Let’s take a look:

Composition of Congress

The U.S. Congress is made up of two chambers.

- U.S. Senate: 100 Members elected for 6 year terms on rotating intervals
- U.S. House: 435 Members elected to 2 year terms every federal election (even years)

The total number of Representatives each state receives is based on population size as reported by the U.S. Census Bureau. Your five-digit zip code identifies your Congressional district. If you live in a big city with a large population, your nine-digit zip code may be needed to determine your congressional district.

Workflow

Constituents elect Senators and Representatives to represent them in the policy debates happening in Washington, DC. Members of Congress have staff that can help constituents with issues they have with the federal government. Staff can help with immigration services, Veterans Affairs, Social Security, and for our purposes, health care related topics. On top of voting for legislation and giving speeches, your elected officials also work on policy-specific committees that focus on the details of legislation and policy issues within the purview of the committees’ jurisdiction.

Committees

Congress addresses a wide variety of issue areas. In order to organize that work and allow members to gain specialized knowledge in certain areas, Congress is organized in committees of jurisdiction. These committees work on all legislation that touches their specific issue areas. For health care professionals, the following committees generally have jurisdiction over legislation that would affect your patients and your practice:

- **House**
  - Appropriations
  - Education and Labor
  - Energy and Commerce
  - Ways & Means

- **Senate**
  - Appropriations
  - Health Education Labor and Pensions
  - Finance

Congressional Offices

Members of Congress generally have multiple offices: one in D.C. and at least one back home in-district. The staff in the D.C. office is focused on policy and responding to constituent mail. The staff in the district office is focused on constituent services and building relationships in the district. Generally, each office will have a scheduler you can contact to set up meetings in the district or in Washington, D.C. Each office will also have additional staff who can help you depending on your issues. Legislative aides or legislative correspondents in the Washington office will often respond to constituent policy questions or meet with constituents in D.C. In the district office, caseworkers can help you with issues you may have with federal agencies, and outreach staffers or constituent liaisons often work to build relationships with constituent groups. Much like a business, staff in these offices follow a chain-of-command:

![Staff Chain-of-Command Diagram]

LCIs and SAs may join in meetings as a junior staffer or note-taker.
**HOW A BILL BECOMES A LAW**

While the process can be complicated, below is a general outline of how a bill can become law:

<table>
<thead>
<tr>
<th>Role</th>
<th>Action</th>
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<tbody>
<tr>
<td>Representative</td>
<td>Introduces bill in the House</td>
</tr>
<tr>
<td></td>
<td>Bill is debated and amended</td>
</tr>
<tr>
<td></td>
<td>Simple majority needed to pass</td>
</tr>
<tr>
<td>Senator</td>
<td>Introduces bill in the Senate</td>
</tr>
<tr>
<td></td>
<td>Bill is debated and amended</td>
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<tr>
<td></td>
<td>Simple majority needed to pass</td>
</tr>
<tr>
<td>House Committee/Subcommittee</td>
<td>Bill is debated and amended</td>
</tr>
<tr>
<td></td>
<td>Simple majority needed to proceed</td>
</tr>
<tr>
<td>Senate Committee/Subcommittee</td>
<td>Bill is debated and amended</td>
</tr>
<tr>
<td></td>
<td>Simple majority needed to proceed</td>
</tr>
<tr>
<td>House Floor</td>
<td>Bill is debated and amended</td>
</tr>
<tr>
<td></td>
<td>Speaker must allow a floor vote</td>
</tr>
<tr>
<td></td>
<td>Simple majority needed to pass</td>
</tr>
<tr>
<td>Senate Floor</td>
<td>Bill is debated and amended</td>
</tr>
<tr>
<td></td>
<td>3/5 majority needed to end debate</td>
</tr>
<tr>
<td></td>
<td>Simple majority needed to pass</td>
</tr>
<tr>
<td>Final Votes/Conference Committee</td>
<td>If both chamber pass an identical bill, the bill is sent directly to the president</td>
</tr>
<tr>
<td></td>
<td>If each chamber passes a similar bill with some differences, a conference committee is formed to reach compromise and combine the bills</td>
</tr>
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</table>

**President**

- The president can sign bills that have been passed by both chambers into law
- The president can reject a bill with a veto; Congress can override a veto by passing the bill in each chamber with a 2/3 majority

You may hear about conference committees deciding the final version of a bill. These conference committees are joint committees of the House and Senate that reconcile the two chambers’ different versions of bills. The process for a bill going through conference is outlined below:

**Once a bill is passed in both house of Congress:**
- If both chambers pass an identical bill, the bill is sent directly to the president
- If each chamber passes a similar bill with some differences, a conference committee is formed to combine the bills

**Who is in the conference committee?**

- Each house decides the number of conference members for its house
- House and Senate majority and minority leadership choose relevant members to join the conference committee

**What is the result of a conference committee?**

- The committee produces a conference report that must be approved by the appropriate committees on both the House and Senate
- The House has a mandatory 3-day waiting period before voting after receiving the conference report (can be waived)
- The Senate has a mandatory 2-day waiting period before voting after receiving the conference report (can be waived)

**How does the committee reach a compromise?**

- The committee often holds a public meeting, then works in private meetings to resolve differences in the bill
- Provisions that are identical in both versions of the bill cannot be changed
- For provisions that differ between houses, the conference committee is expected to make a change that incorporates both or compromises between the two. Only rarely are completely new provisions introduced in conference

**How is the bill finally passed into law?**

- Each house holds a vote for or against the bill. If a majority approves, the bill is sent to the president to sign

It is important to note that the likelihood of a bill becoming a law is quite rare. Only 6% of bills introduced made it to the floor of either the House or Senate for a vote by the full chamber.
COMMUNICATIONS: ENSURE YOUR VOICE IS HEARD

As an osteopathic physician, resident or student you have a unique perspective that's valuable to members of Congress. Out of the 535 members of the House and Senate there are only ever a handful of physicians and healthcare experts serving, generally fewer than 5 percent!

However, in an era of constant communication, it can seem daunting to get across that perspective. Turns out, it can be easier than you think! We have great tools for AOA members that allow them to reach out to their members of Congress:

1. **Emails and Letters**

   Written communication is a great way to get an issue in front of your member of Congress, especially in the early stages of a legislative campaign. When it comes to issues that are important to the osteopathic profession, we make it easy. Our Grassroots Advocacy Center allows you to send pre-written letters to your member of Congress. Here are a few tips to consider when writing your member of Congress:

   - **Be Concise.** We will provide a template that you can edit, but don’t add a page of text to it. Congressional staff receive hundreds of letters, and are more likely to gloss over the longer ones.
   - **Add a personal story.** While we will provide basic facts and background on the legislation, it’s important you connect the issue back to your home state or district. A story that shows how the issue directly affects the member of Congress’ constituents is more likely to be noticed.
   - **If you’re sending a physical letter, consider sending it to both the district and DC offices.** The DC office will flag the letter for policy considerations. The district office may flag the letter as an ongoing issue in the district that they may want to have the member address when they are back in district.

2. **Social Media**

   Social media has an increased influence on members of Congress given its public nature. Lawmakers are utilizing it given that they are able to connect with their constituents faster than ever before.
“One of the advantages [of social media] is that you can immediately reach someone in an important position directly in a very immediate way, so take advantage of those technologies.”
— Rep. Brendan Boyle (D-PA-13)

A recent report from the Congressional Management Foundation shows that it takes just 30 similar tweets or Facebook posts directed at a member of Congress to get the attention of their staff. For many of the email campaigns we run, we will also provide a draft tweet you can send to your members of Congress. While we would not recommend sending 30 tweets yourself to your member of Congress, if every DO in the district acted during a campaign it could be enough to get your member interested.

3. Phone Calls

When there is a vote coming up, or another serious issue, phone calls are an extremely effective way to influence your member of Congress. Members will often look at how many constituents called their office to voice support or opposition on a particular bill; some will even mention that fact when they speak on the floor!

While phone calls can be effective, they’re only effective if they’re done right. We will provide a script for any call-in campaigns the AOA runs, but there are a few key things to keep in mind:

- **Be polite!** While issues may be heated, and you may not always agree with your member of Congress, you’ll get nowhere by yelling. Remember, it’s a real person on the other end of the phone, often an intern or junior staff, so a little kindness goes a long way.

- **Introduce yourself:** Be sure to say who you are, where you live, and that you’re a DO. It’s important that the office understand who is calling and that they’re speaking with a constituent.

- **Be Concise:** There is usually a high call volume to Congressional offices, especially before a big vote. After you introduce yourself, give a quick overview of why you called. Tell them what issue you’re calling about, whether you’re for or against it, and give a quick reason why the office should take your position. Ideally, this would not go longer than 2 minutes.

4. In-Person Visits

An in-person visit is a great tool to use when building relationships with a Congressional office. By sitting down with a member of Congress or their staff, you can help bring visibility to the osteopathic profession and have a conversation about a policy priority. The following are some tips for scheduling and presenting in meetings:

- In DC or in district, always take the meeting you’re offered, regardless of who it’s with. While everyone wants to meet with the member of Congress or the chief of staff, meeting with front-line staff is just as important. Staff in the district schedule the members’ events when they’re back home and staff in DC often propose policy ideas to the members of Congress. Having the ear of staff is a great way to start building a relationship with a Congressional office.

- Bring something to leave behind with the staffer or member of Congress. Whether it is a one-page fact sheet about the AOA or a fact sheet about a particular issue, be sure to leave the staff with something. If you’re bringing a fact sheet about a particular policy issue, be sure to keep it to no longer than 2 pages. Anything longer is generally not useful to policy staff.

- Try to get on a distribution list for local events. You can’t always get a meeting, but stopping by a town hall or other public event will help you build that relationship with the member and their staff.

<table>
<thead>
<tr>
<th>1: Be on time</th>
<th>2: Be flexible</th>
<th>3: Stay on topic</th>
<th>4: Keep politics out of it</th>
<th>5: Leave behind brief information</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Congressional schedules are often extremely tight. Being prompt will allow you to spend more time with the member of Congress and their staff while being respectful of their time.</td>
<td>• Prepare to meet with either the Member or the member’s staff, treat both with equal respect.</td>
<td>• Inform the scheduler if you are going to be late in case another meeting time must be arranged.</td>
<td>• Do not discuss elections or campaign support in your meeting.</td>
<td>• Leave behind a 1-2 page briefing with data points on the issue discussed with the Member’s office.</td>
</tr>
<tr>
<td>• If the Member arrives in the middle of your meeting, continue as usual and the Member will ask questions if needed.</td>
<td>• Raise only the issue you scheduled to discuss with the Member and/or the Member’s staff to keep the meeting focused and persuasive.</td>
<td></td>
<td>• Respect the Member’s political views and relationships outside of the issue at hand.</td>
<td>• The document should serve as a helpful resource for staff as the issue moves through Congress.</td>
</tr>
</tbody>
</table>
Congratulations! You have just completed your first Congressional meeting. Now it is time to build upon the relationship you established with your members of Congress and their staff.

**Send a Thank You Message and Valuable Information**
- Send a brief follow-up e-mail after meeting with the member of Congress
- Thank the Member and/or staffer for their time
- Add a reminder of the meeting topic for the office’s reference
- Include information from a reliable source to keep the office aware of your issue

**Attend Events in the District**
- Attend town hall meetings or other public events in your district to increase visibility with your member of Congress
- Find opportunities to engage in policy matters in the district—including building relationships with district staff—to serve as a trustworthy resource on your issue

**Stay in Touch**
- Do not over-communicate with Members, but do pass along new information about your issue as it is released
- Communicate with your representative—and their staff—in a respectful and informative manner to gain their respect for you and your points of view

**How to Influence: Make it Stick**

If you’re going to take the time to advocate on behalf of your profession, you should be sure to do it effectively. Whether it’s an email, phone call, or in-person conversation, you’ll only have a few minutes to get your point across. If you follow these four suggestions, it will help ensure that those few minutes are time well spent, and your point sticks in the mind of the staffer or member of Congress.

**Keep it Simple:** Get at the core of the idea. The policy issues we discuss are complex, but there won’t be time to discuss every detail of health care policy. Politicians normally write their speeches to be at a fourth to sixth-grade level because that helps their ideas stick and ensures they are easy to understand.

**Make it Concrete:** Make sure the ideas are grounded in reality. Policy discussions can get theoretical, but be sure whatever you’re talking about always comes back to the district. If the staff or member of Congress can easily see how this will directly affect their constituents, they’re more likely to listen.

**Stress your Credibility:** As a physician discussing health care policy, this is easy. As a practitioner, you are inherently a credible messenger. Tell the staffer or member of Congress what sort of medicine you practice, and briefly explain how that relates to the policy issue at hand.

**Use Emotional Stories:** You may be tempted to stick to data and facts, but don’t be afraid to tell an emotional story. Health care is an emotionally charged subject; you’re talking about people’s lives. Don’t violate any patient privacy laws, but tell a story about how policy had negatively or positively affected your patients. Staffers and members of Congress are always looking for emotional stories for floor speeches or talking points because they are more memorable than facts. A good story will help make your meeting stick out.

**Members Value Staying in Touch with Constituents...**
- Constituent conversations guide policymaking
- Reelection hinges on their ability to serve the constituents who vote for them into office
- Members trust their staff to help them listen to constituents, so advocates should not be surprised if they meet with staff in lieu of a member

**...And Find Personal Communications Persuasive...**
- Individual letters and e-mails can have greater influence on member decision-making than form letters
- Advocates should focus in sending more personal messages to their member of Congress to capture their individual voice or perspective

**But Visitors with First-hand Knowledge of Policy Impacts Are Most Compelling**
- Constituent conversations guide policymaking
- Reelection hinges on their ability to serve the constituents who vote for them into office
- Members trust their staff to help them listen to constituents, so advocates should not be surprised if they meet with staff in lieu of a member

**Influence of advocacy strategies directed at a member’s DC office**

<table>
<thead>
<tr>
<th>Strategy</th>
<th>A lot of positive influence %</th>
<th>Some influence %</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-person issue visits from constituents</td>
<td>54%</td>
<td>40%</td>
</tr>
<tr>
<td>Contact from constituent’s reps</td>
<td>47%</td>
<td>48%</td>
</tr>
<tr>
<td>Individualized e-mail messages</td>
<td>31%</td>
<td>62%</td>
</tr>
<tr>
<td>Individualized postal letters</td>
<td>38%</td>
<td>60%</td>
</tr>
<tr>
<td>Individualized personal letters</td>
<td>27%</td>
<td>61%</td>
</tr>
<tr>
<td>Local editorial referencing issue pending</td>
<td>27%</td>
<td>61%</td>
</tr>
<tr>
<td>Comments during a telephone town hall</td>
<td>50%</td>
<td>59%</td>
</tr>
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* Asked of Chiefs of Staff, Comms Directors, Legislative Directors/Assistants
TYING IT TOGETHER: AN ADVOCACY CASE STUDY

The opioid epidemic hit the U.S. population hard. Overdoses from substance use disorders have dramatically increased in the United States. In 2016, more than 46 people died every day from overdoses, and today, according to the Centers for Disease Control and Prevention, 40% of all U.S. opioid overdose deaths involve a prescription opioid. Along with this growing epidemic is the growing health care workforce shortage in and crushing medical student debt. The Council of Graduate Medical Education projects a shortage of 85,000 physicians in 2020 – the impact of which will be more dramatic in rural communities.

The AOA saw a unique opportunity to incorporate the osteopathic philosophy to combat this epidemic.

In October 2017, AOA’s Public Policy staff collaborated with members of Congress, their staff and DOs that specialized in substance use disorders to draft a bill that would combat the opioid epidemic all while addressing student debt and workforce shortages. After months of meetings, the Substance Use Disorder Workforce Loan Repayment Act (SUDS Act - H.R. 5102) was introduced in the U.S. House of Representatives. The Senate followed suit and introduced a companion bill (S. 2524), similar to the House’s version. This bill would provide up to $250,000 in loan forgiveness for medical professionals who choose to work in substance use treatment facilities in areas of the country that are highly affected by the opioid crisis.

To raise the visibility of the SUDs Act, we then called on you through an advocacy alert to let your members of Congress know that the SUDs Act is important to not only you, a physician but the patients you serve. We asked you to connect with your members of Congress through email, social media and in person. More and more members of Congress co-sponsored the SUDs Act as their inboxes were full of emails from you and your colleagues asking them to support the bill.

As we learned earlier, the likelihood of a bill getting a vote in the House or Senate is rare – typically only 5%. In addition to encouraging physicians and students to write their members of Congress, we also had physicians from around the country meet with their representatives to discuss the issue and how it impacts their constituents. The compelling stories and anecdotes began to resonate and influence members of Congress on their support of the SUDs Act. In June 2018, the House of Representatives heard your call to action and moved to vote on the SUDs Act, but as we know, it takes both chambers to pass a bill.

The Senate moved to vote on the SUDs Act in September 2018. It was the Senate’s version of the bill, but it was slightly different. A more watered-down version of the bill that wouldn’t have been as impactful as the House version. The journey a bill takes to become law can be complicated. That was very much the case for the SUDs Act. At this point, both the House and Senate passed their versions of the SUDs Act, so now it was up to a conference committee to reconcile the differences between the two bills.

Collaboration and coalition building is a powerful advocacy tool. The AOA sent a sign-on letter, featuring more than 40 national health organizations, asking members of Congress to pass the House version of the SUDs bill in the final opioid package. That letter was followed up by AOA advocates from across the country reaching out to their members of Congress asking them to do the same.

After more than a year of steadfast lobbying by AOA Public Policy staff and advocacy from AOA members like you, the conference committee moved to pass the AOA-supported version of the SUDs Act! Shortly after, the President signed the SUDs Act into law. Between AOA staff and grassroots advocates, 225 meetings were conducted with members of Congress and their staff on this issue. Below is a brief timeline of how the SUDs Act became law.

1. **OCTOBER, 2017**
   - AOA Department of Public Policy collaborates with DOs and Members of Congress to write the SUDs Act (H.R. 5102).

2. **MARCH, 2018**
   - SUDs Act (H.R. 5102) introduced in the House of Representatives.

3. **JUNE 11, 2018**
   - Due to visibility from the advocacy efforts, the House passes the original SUDS Act bill. The AOA sent to advocates to encourage their House members to vote yes.

4. **SEPTEMBER 18, 2018**
   - Senate passes a pared down version of the SUDS Act. House and Senate need to reconcile differences. Action Alert sent to advocates requesting their members to vote yes.

5. **SEPTEMBER 25, 2018**
   - Congress keeps AOA-endorsed version of the SUDS Act after conference committee.

6. **PRESENT DAY**
   - The US House of Representatives passed the AOA-endorsed version of the SUDS Act. The Senate is expected to vote on the legislation in the coming weeks, and it is expected to pass. The President will then sign SUDS Act into law.
This is just one example of how you can partner with the AOA to influence legislation. Imagine the impact we can make by having more DOs involved in the legislative process. We hope that this guide provided you with the tools you need to succeed in grassroots and advocacy on behalf of the osteopathic profession. Should you need further guidance, do not hesitate to reach out at any time.

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Website: www.osteopathic.org/grassroots