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Executive Briefing & Advocacy Strategy: Navigating Today's Policy Landscape & Making Your Voice Heard

12:45 – 3:15 pm
International B

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GROUP



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Advocacy 101: HOW To Effectively Advocate Before Elected Officials, Media and the Public

Presented by Gerald “Jerry” Cohen, J.D.,M.P.A.

www.evolvingelders.com

LeadingAge Washington Fall Conference 10/14/2025



Access Slides



1. Do you know who your state legislators are? Congressional delegation? Local officials?
2. Do you personally know an elected official? How?
3. Did you ever speak to an elected official about a policy issue you were interested in?
4. Did you ever testify before a policy making board/public hearing?
5. Have you ever written a letter to a media outlet concerning an issue you care about? Post same on social media platform?
6. Have you ever attended an elected official's Town Hall or a campaign event?

- This session will provide you with a brief understanding of Advocacy
- Offer tips for effective communication with elected officials and their staff before, during and after legislative sessions
- Provides tactics for using various print and social media to promote public awareness of and engagement on your issue(s)

So What is Advocacy vs Lobbying?

- Advocacy is what you do when you provide information on a policy issue. This may encompass:
 - Public Education on an issue (but NOT taking a position)
 - Generating Research papers citing facts
 - Offering Tours of your program for elected officials/their staff
 - Advocating how a policy impacts your program/industry (taking a position)
- Lobbying is a form of advocacy that is set out in both IRS and State law. It addresses speaking to legislator(s)/elected officials (or their staff) on a specific proposed piece of legislation while expending resources. For purposes of this session, our focus is on advocacy. Leading Age staff are the lobbyists and handle this aspect.

Washington State Definition:

Lobbyist: Anyone who is paid to lobby state government or who makes lobbying-related expenditures must register. A lobbyist includes any person who lobbies either on his own or another's behalf. (That is usually Alyssa Odegaard as your registered LeadingAge Washington lobbyist).

Lobbyist Employers: Any person or entity who employs a lobbyist or compensates another person for lobbying. That is LeadingAge Washington.

Why Advocacy?



- Educates the public on what your organization does and how your work contributes to the health of the community. It helps engage members of the public to understand and speak up for your issue.
- Addresses proposed policies that harm the outcomes of your work or need to be addressed to further enhance your work. Advocacy helps **solve problems at the systems level**.
- Other organizations and individuals may share your concerns. Advocacy can help create coalitions of shared interests. This builds community and impact.
- Visibility and ultimately success builds upon your strength!

A few questions for you

- For those who indicated you know who your legislators are: How did you first learn this?
- For any of you who have advocated on an issue with a legislator, briefly describe how you prepared, what you did in meeting and afterwards?
- For any of you who ever testified at a hearing, what was experience like?

First: Cultivate relationships & presence

- Identify who your elected official(s) are: <https://www.lwwa.org/who-represents-you>
- Get to know and try to meet with elected officials BEFORE session and AFTER session. Get to know their “story” and interests! This will be useful on future issues and offers insights!
- Attend and speak at Town Halls of elected officials (while sharing story). Note their responses and follow up. Others are also listening!
- In election year cycle, attend and ask questions of candidates. Record their responses!
- Start local, too: Observe and cultivate the “up and comers”!

How to Speak with Legislators/Staff...a FEW TIPS

- Be respectful no matter how intense the meeting/issue! Thank you at start for the time...thank at the close for listening! Note if you are a constituent of the legislator or IF not, but you represent some constituents, then state your ASK and brief story on why!
- Get to know the staff aide(s)...often the “door opener” and can help influence!
- Note that at times your legislator will have been pulled away before/during meeting and a staff member might continue the conversation! Don't be ruffled!
- Never fudge on an answer. IF you don't know, admit and state you will get back to legislator (or Alyssa will).
- Did I say, BE RESPECTFUL enough? Seriously, no matter how rude or put offish that official might be in the moment, stay calm and grit your teeth.

Communicating with Elected Officials (but also for Media, Public, etc.)

- KISS: Be brief and succinct (think 2-3 minute rule)
- Start with desired outcome “we are working to secure passage of a Xb xxx. It will increase the quality of life of vulnerable Washingtonian. Here is why...”
- Use a brief, compelling story (vetted already for truth/facts!) to buttress any “data”.
- Ideal is having person impacted briefly share their story with you (but written piece is good). Stories that then use simple data to buttress is best!
- When asked a Question you do not know the answer, NEVER make one up! “I don’t know the answer and will have someone get back to you”!

More Tips on Meeting with Elected Officials

- Hone and practice your story/message and your ASK before you meet: Stay succinct/on message and passionately dispassionate! Keep it brief---2 to 3 minutes. End by asking IF the legislator now supports your position; if not (or undecided), still thank and ask IF there is anything more that can be of help.
- Again: Don't guess or try to make up answers...defer to experts and promise to get back to the legislator/questioner!
- A one page handout as a leave behind is good (but also beware that some legislators and media now go paperless)!
- Make notes of meeting (who attended, body language etc.) to share with your LeadingAge advocacy team!
- Sending a thank you note afterwards for the time given to you

Communicating with Media and the Public!

- Use guest op-eds and Letters to Editor that also highlight story, data and your ASK! Remember that your LeadingAge team can help!
- These days, also use Social Media, recognizing that some may troll or disparage! Avoid engaging those! Just the story and the facts, please! One professional site that can help with professionals is LinkedIn.
- Letter writing campaigns to elected officials also count, but make sure these are NOT form letters! Each should tell a more personal story!

It ain't over till its over, and never be complacent

- Successful **implementation** of any legislative policy win is the key
- IF you can, serve on a regulatory/advisory board for policies; be at the table
- Just like working with elected officials, know who the regulators are and engage when called upon by LeadingAge. Monitor proposed rules/regulations/policy memoranda (LeadingAge can alert you)
- Recognize that there may be unanticipated hurdles and unintended consequences from the legislative policy you thought was secured (be open and humble)
- Share the results of advocacy with others (that includes elected officials, media, public and certainly the persons and families you care for)
- Celebrate the victories (small as well as big) and de-brief on all on lessons learned

