

Chapter Advocacy Toolkit

A Guide for Public Policy Advocacy

2021 - 2022

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Introduction

The HIMSS Chapter Advocacy Toolkit outlines the role chapter advocates play and activities and resources to support chapter advocacy activities.

For additional resources, view the Chapter Leader Resource Area (CLRA) [here](#). When this document refers to state, territory and province related activities are implied as well.

Chapter Advocacy Task Force Overview

The [HIMSS Chapter Advocacy Task Force](#) informs, empowers, and mobilizes chapter leaders to advocate for health information and technology public policy at the state, provincial, and local levels. Task force members serve as respected sources of information related to health information and technology, health transformation, and HIMSS public policy priorities. Members meet monthly for peer-to-peer learning.

The HIMSS Government Relations and Chapter Advocacy leadership (Chair and Regional Vice Chairs) lead the Task Force and provide opportunities for training, learning, and displaying chapter advocacy efforts and accomplishments.

Chapter Advocate Role

- Become familiar with HIMSS resources on the [CLRA](#) and with [HIMSS public policy priorities](#)
- Create a plan ([see template here](#)) and regularly update chapter leaders and HIMSS staff on progress, successes, and challenges
- Participate in regular [Chapter Advocacy meetings](#) to learn public policy news, share updates with and learn from your peers
- Gain recognition for your valuable efforts through participating in the [Chapter Advocacy Recognition Program](#)
- Participate in chapter leader learning opportunities at [Chapter Leader Exchange](#) and [HIMSS Global Health Conference](#)
- Maintain relationships with and educate key public and private stakeholders about HIMSS's policy priorities
- Coordinate at least one advocacy and public policy-related Chapter activity per year

Additional ways to get involved

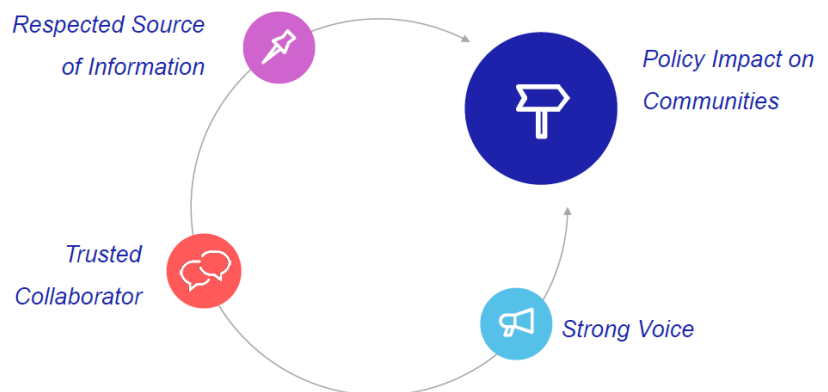
- Plan an Advocacy Day (also known as Health IT Day) with visits to state government officials or legislators during their [legislative session](#). See [Advocacy Day Toolkit](#) for guidance.
- Feature advocacy and public policy through all chapter events (e.g. Include panel on public policy at chapter conference and feature state-level officials)
- Monitor regulations, administrative actions, and legislation on issues important to your chapter [here](#) and your state's legislative webpage
- Summarize public policy updates for membership (e.g. "[Advocacy Dispatch](#)" for Southern California members)
- Write to your elected officials through HIMSS's virtual campaigns on the [Legislative Action Center](#)
- Advocate for officials to leverage HIMSS's priorities in the development of state plans or legislation

- Recognize officials for their efforts and accomplishments
- Spread awareness about your chapter advocacy efforts through social media and submitting a [resource article](#)
- Collaborate with other chapters to broaden reach of events, webinars, and campaigns
- Provide an Advocacy 101 training for your chapter members
- Request a proclamation (governor: [example here](#)) or resolution (legislature: [example here](#)) recognizing State Health IT Day

Additional ways to get involved can be found [here](#)!

Tips and Tools

Chapters should understand the values and principles of the Chapter and of the HIMSS Enterprise, which will help drive advocacy priorities. Tenets of Chapter Advocacy include a strong voice, leading to your chapter becoming a respected source of information and a trusted collaborator. This work aims to influence policy at the local, state, provincial and national levels.



General Advocacy Tips

Advocacy in its simplest form is all about connecting and educating key stakeholders. HIMSS aims to equip chapter advocates with the knowledge and empower you to become a trusted figure for policymakers to rely on. Keep the following tips in mind:

- Set a plan and evaluate progress
- Be succinct and avoid jargon.
- Form an advocacy committee, particularly to plan [Advocacy Day](#)
- Collaborate and expand your network
- Use your voice! It can be a phone call or email to a government official, your legislator's office, a letter to the editor, offering comment at a county commission meeting, or holding an educational event at the Capitol building
- Review and comment on your state's health IT related policy levers such as state health IT strategic plans or roadmaps, if they exist
- Learn from and share with your peers – [Sign up](#) to be a chapter leader mentor or mentee
- Present lessons learned/model practices during Chapter Advocacy Task Force meetings
- Create opportunities to meet during HIMSS events to demonstrate or discuss model practices
- Provide and ask for resources, tools, information, and inspiration

| What is in your advocacy toolbox?

Effective advocacy involves a number of activities that support an organization's goals. HIMSS encourages chapter advocates to employ the following strategies:

- Education and thought leadership
- Relationship building
- Monitoring policies and legislation

Education and Thought Leadership

Thought leadership means **first** understanding HIMSS's public policy priorities. In 2021/2022, our global focus areas include:

- COVID-19 response, relating to data sharing and tracking, contact tracing, vaccine distribution and administration, supply chain, etc.
- Interoperability, information sharing, and US national patient ID strategy
- Connected health (telehealth, remote patient monitoring, broadband)
- Cybersecurity and data privacy
- Health Equity

Learn more at <https://www.himss.org/himss-public-policy-center>.

Next, identify your *chapter's* focus areas and policy priorities, with an understanding of your available resources, which should align with HIMSS's general priorities above.

Finally, share your knowledge and priorities with your chapter, government, and the public. Remember, *you* are the experts! Be available as a resource on these topics for government representatives.

Relationship Building

A significant part of your role as Chapter Advocate is to build relationships. These relationships may include government and non-profit representatives as well as your fellow chapter leaders and members. There is great power in collaborating with other organizations who share a similar vision. Many of your relationships with these organizations could help bolster visibility of shared issues with key decision-makers. Often, chapter leaders and members may be employed by or have relationships with these potential partners.

The following lists stakeholders for outreach to influence decisions and build your network:

Chapter	Government	Private Sector
<ul style="list-style-type: none">• Chapter Leaders• Chapter members	<ul style="list-style-type: none">• Legislators and staff members (pay attention to Health-related committees)• Governor's and Lt. Governor's office• Health & Human Services Department Administrators• State Health Officers• State Health IT Coordinators• Mayor's Office	<ul style="list-style-type: none">• Associations and their chapters• State/Regional Health Information Exchanges• Academia – leverage students for internship and volunteering• Consultants and Vendors (for sponsorships and public-private partnerships)

Monitoring Policies and Legislation

Advocates should monitor and analyze legislation, regulations, policies, and practices. You may monitor U.S. state legislation on the [Legislative Action Center](#) or on your state legislative webpage. Summarize policy updates to share with your advocacy committee and membership.

[Learn how a bill becomes a law](#), according to Schoolhouse Rock! Refer to the [FAQ section](#) for the step-by-step process.

Virtual Advocacy

What should you do if meeting or advocating in person is not safe or feasible? With the use of technology, and the lessons learned from 2020 and 2021 where we needed to protect our community from COVID-19 and stay socially distant, there are still ways to advocate in a virtual world.

Benefits of virtual events:

- Wider reach: Everyone, with proper broadband access, can attend, which welcomes those who may not have been able to attend in person due to inclement weather, travel, and personal obligations
- Typically lower cost
- Virtual technology use can be an equalizer for small chapters who may lack the number of members to implement a larger scale, in person event



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*These past months have been a balance struggle. ...But **if you consider the principles of advocacy, they work in a virtual world as well:** informing a legislator or member of Congress how a policy affects constituents, conversations with elected officials to educate them how a particular issue is affecting a group or organization, and using social media to get the word out about an issue.*

Kevin Conway
Nebraska Chapter Leader

- Ability to partner with other chapters easily and share resources

Types of virtual advocacy days:

- **Hybrid: Features both in person and virtual elements**
Accommodates fewer attendees in person, while also expanding reach for part of the program (e.g. Small group visiting legislative offices, followed by a hybrid webinar session)
- **Virtual only**
U.S. Chapters: Leverage the [Legislative Action Center](#) to set up a state-level virtual campaign. Please submit your request [here](#) or refer to the instructions and template in the [Appendix](#). This will allow your members and the public to reach out to their state legislators with just a few clicks.

Use Zoom to host meetings and webinars focused on advocacy and public policy. Invite key stakeholders, including legislators, to speak.

Virtual meetings and events may lead to in person meetings in the future and helps sustain relationships with key stakeholders.

The following are technology platforms to consider using for your advocacy meetings and events.

- Zoom meetings or webinars
- E-newsletters
- Social Media (e.g. Twitter, LinkedIn, etc.)
- Survey Tools (e.g. SurveyMonkey, Google Forms, etc.)

Best Practices

- Turn on your camera to strengthen relationships (but strike a balance to avoid "Zoom fatigue")
- Connect with others and share content on social media
- Make your virtual meetings/webinars interactive, such as using a live poll, requesting brief introductions of audience members in the chat box, or using breakout rooms, to engage audiences
- Set boundaries for yourself. Give yourself breaks in between meetings to refresh and move around.
- Understand the differences between Zoom meetings and Zoom webinars.
- Have a backup plan when Wi-Fi is not sufficient (Have an Ethernet cord handy)
- Develop talking points or script.
- Send out materials in advance to achieve consensus on agenda and conversation topics.

"For California, last year's virtual Advocacy Day drew in more than 400 registrants. We were worried about audience participation with this format. Surprisingly, since attendees could ask questions and add comments via chat, we had a lot more questions than expected! The virtual format allows us to reach people who typically have a lunch hour to spare and not an entire day.

Skipping the logistics and cost of in-person travel has drastically increased our registrants and reach. We are currently planning a tri-chapter event and we don't have to worry about hotel rooms, ballrooms, and coordinating flights for the speakers. As an organizer, that's half the battle won!"

- Ensure you have members from the home district of the legislator on meetings with legislative offices
- Send out materials in advance with [HIMSS public policy background](#) and top three asks which you can share during the meeting
- Rehearse to help ensure good timing and smooth transitions between speakers

Lessons learned:

- You may not speak with person you intended to speak with, since the virtual setting may make it easier to delegate to others to fill in at the last minute - multiple confirmations are one way to ensure you get to the right person
- Some individuals connect better in person or one on one - adjust expectations accordingly

Frequently Asked Questions

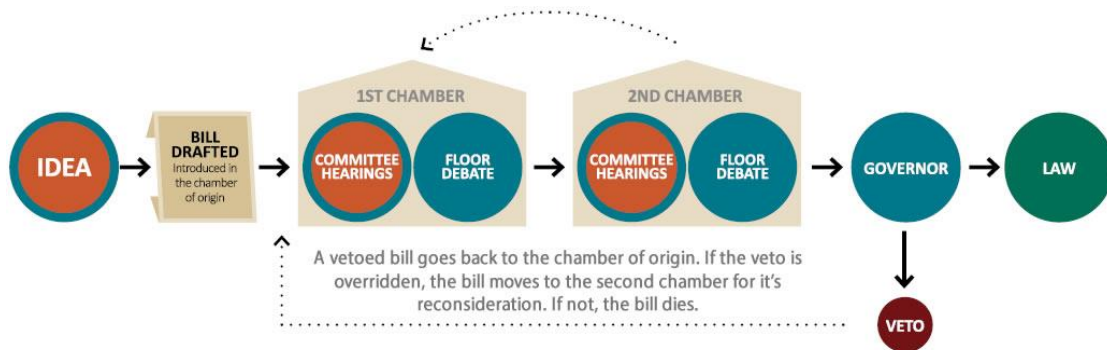
How does a bill become a law at the U.S. federal level?

1. A Member of Congress introduces a bill or proposed legislation into their legislative chamber (House of Representatives or Senate)
2. Officer of the chamber refers the bill to one or more committees, depending on its subject
3. Committee members review the bill and decide whether to hold public hearings, to combine it with related draft legislation, to propose amendments, to recommend that the chamber consider it favorably, or set it aside for possible later review
4. If the committee(s) return the bill to the chamber in which it was introduced, members debate the bill and may consider further amendments
5. The full chamber (House or Senate) in which it was introduced considers the bill; if it passes, the bill is referred to the other chamber and the process begins again
6. If a majority in the House and the Senate agree, the bill passes
7. The bill is sent to the President, who may sign the bill into law or veto it
 - a. If the president vetoes the bill, Congress can override the president's veto by a two-thirds vote of both the House and Senate

[Learn more](#) about how a bill becomes a law.

How does a bill become a law at the U.S. state level?

The process is very similar at the state level and can differ by state. Instead of Members of Congress and Senators, state legislators are often called State Senators, Representatives, or Assemblymembers. Rather than sending the bill to the President for signing, the legislative body sends the bill to the Governor. As an example, learn how a bill becomes a law in [Colorado](#):



Source: [National Conference of State Legislatures](#)

What is the Canadian legislative process at the national and provincial levels?

The national Canadian legislative process includes all three parts of Parliament: the House of Commons, the Senate, and the Monarch. These are the steps at the national level for a bill to become a law:

1. The bill begins in the Cabinet where legislators review and decide which measures the government wants to implement through legislation
2. Following the Cabinet's approval, the responsible Ministry issues drafting instructions to the Legislation Section of the Department of Justice
3. The bill is introduced in the House of Commons or Senate and the first reading occurs
4. A second reading occurs to debate the principle of the bill and vote whether it should be studied further
5. If the bill passes the second reading, it is sent to a Parliamentary committee where amendments can be made
6. When a committee is done with its review, it is brought back to the Chamber for any additional amendments by members and the bill is read for a third and final time and is then voted on. This must be sent to the other Chamber (House/Senate depending on origin) and follows the same process
7. Once both Chambers have passed the bill in the same form, it goes to the Governor General, who can grant Royal Assent and the bill becomes law

At the provincial and territorial level, bills pass a similar process. The exception is bills do not need to move through the upper house, as this does not exist at this level. Bills pass through only one sequence of first reading.

What are executive orders or actions?

A president or governor can issue an executive order. Gubernatorial (governor) executive orders are subject to legislative review in some states. Governors issue executive orders for a variety of reasons, including taking immediate action in response to natural disasters or public health crises. [Learn more](#) about governors' powers and authorities.

What are proclamations?

A president or governor declares a proclamation, a statement that addresses policy matters and are mainly symbolic, to recognize a cause. Many chapters request a proclamation ([View a letter template to request one](#)) from the Governor declaring "State Health Information and Technology Day" when they hold an Advocacy Day or event. This can spur greater attention to the issues.

How can I connect with elected officials?

Once you enter your information on the HIMSS [Legislative Action Center](#), you may identify and contact the elected officials that represent you and your district. You will find a complete list of legislators and staff on your state's legislative websites and a list of your state legislators here:

[States AL - FL](#)

[States GA - LA](#)

[States MA - NY](#)

[States NC - UT](#)

[States VA - WY](#)

It is best to start with the legislators that represent your home district (You are their constituent and it is their job to hear from you!) and those that are leaders or members of health committees.

Do not be disappointed if you reach staff members of elected officials – they may know more about the issues and have more time to meet with advocates.

What should I bring with me to meet with offices of elected officials?

- [HIMSS two-pager on public policy](#)
- One pager about chapter, membership (number and makeup) and information on upcoming events
- Summary of asks, if applicable
- Business card
- Your advocacy team members or chapter leaders/members

Where can I track state legislation?

You may search and track state legislation on HIMSS's [Legislative Action Center](#) for a selection of health IT-related bills and on your state's legislative website for a more comprehensive review.

Where can I find additional resources on chapter advocacy?

The go-to tool for all things advocacy is the [CLRA](#). Some of the resources you will find are:

- Advocacy planning and tips
- Planning for your Advocacy Day
- HIMSS public policy priorities

- Contact information for Chapter Advocacy Task Force Leaders and mentors

How can I connect with other Chapter Advocates and Leaders?

We encourage you to connect with the Task Force Chair and/or Vice Chair assigned to your region in the following section or with HIMSS staff (policy@himss.org). You may also sign up to be a chapter leader mentor or mentee.

What is the difference between advocacy and lobbying and what does this mean for chapter advocates?

The distinction between advocacy and lobbying is that advocates are typically volunteers that reach out to government officials and ask them to address a public policy issue. Lobbyists can be considered advocates, but generally are focused on advocating for a particular issue in a professional capacity, through either their job or a professional affiliation. In addition, to be considered a "lobbyist," an individual would generally have to meet a threshold on the number of hours they spend "lobbying," and register as such with the federal or state government.

It is unlikely that HIMSS Chapter Advocates, in their work on behalf of their chapter, would reach the threshold where they would have to register with their government and be considered a lobbyist. The regulations do vary by state and a good compilation on state laws is available here.

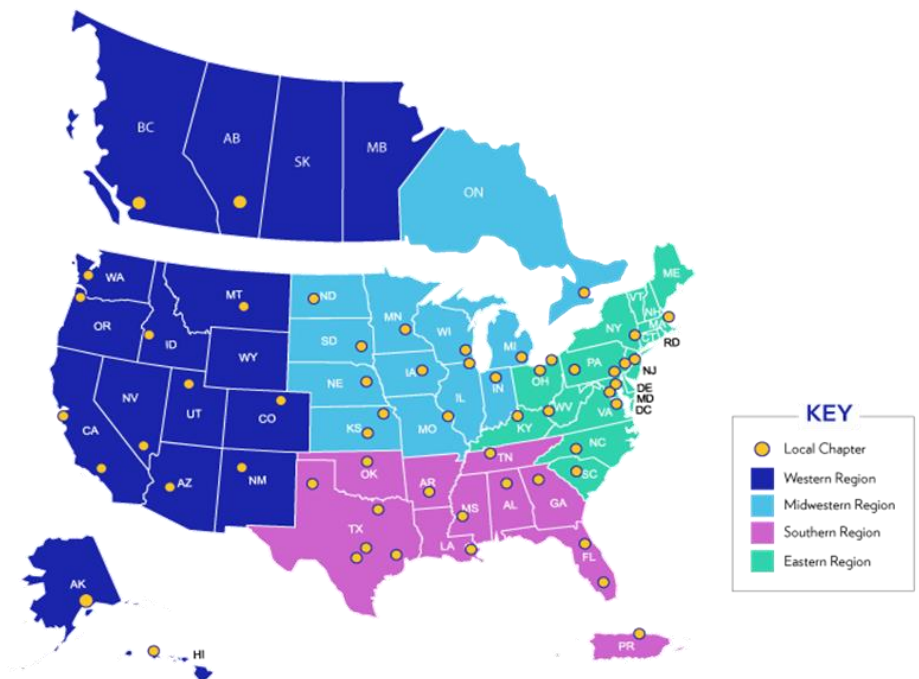
Task Force Leadership and Regions

The Chapter Advocacy Task Force is sectioned into seven regions as indicated below. The Task Force Leaders advise HIMSS staff on strategic direction and act as peer mentors for Chapter Advocates. The Chair leads the monthly meetings. The Vice Chairs support overall efforts and act as mentors to chapter advocates in their region. We encourage you to reach out to these individuals for peer support.

Chair:
 Ian Slade, Southern California Chapter
ian.slade@itconsultinggrp.com

Vice Chair, Pacific Region
 Amanda Bergamo, New Mexico Chapter
Amanda.Bergamo@UnityBPO.com

Vice Chair, East Region
 Ed Grogan, Maryland Chapter
Ed.Grogan@jhmi.edu



Vice Chair, Midwest Region
 Jim Kamp, Michigan Chapter
Jim.Kamp@altarum.org

Vice Chair, Southwest Region
 Nasim Rezanejad, Houston, Texas Chapter
nasim.rezanejad@yahoo.com

Eastern	Midwestern	Southern	Western
Delaware Valley	Greater Illinois	Alabama	Arizona
Maryland	Greater Kansas City	Arkansas	California - Northern
National Capital Area	Indiana	Florida - Central & North	California - Southern
New England	Iowa	Florida - South	Colorado
New Jersey	Kansas	Georgia	Hawaii - Alaska
New York	Kentucky Bluegrass	Louisiana	Idaho
North Carolina	Michigan	Mississippi	Montana
Ohio - Central & Southern	Midwest Gateway	Oklahoma	Nevada
Ohio - Northern	Minnesota	Puerto Rico	New Mexico
Pennsylvania - Central	Nebraska	Tennessee	Oregon
Pennsylvania - Western	North Dakota	Texas - Austin	Utah
South Carolina	South Dakota	Texas - Dallas / Ft. Worth	Washington State
Virginia	Wisconsin	Texas - Houston	Canadian Prairies
West Virginia	Ontario (Canada)	Texas - Lubbock	British Columbia
		Texas - San Antonio	

Meetings and Events

Meeting/Event (2021-2022)	Timeframe
Chapter Fiscal Year 2021 Ends	June 30, 2021
FY21 Chapter Advocacy Recognition Submissions Due	July 1, 2021
Task Force Monthly Meetings	Third Friday every month at 12 pm ET (with some exceptions)
Office Hours	On regular basis TBA on Zoom
Chapter Leader Event at HIMSS Global Health Conference & Exhibition	August 9-13, 2021, Las Vegas, NV
Chapter Advocate and Chapter Leader of the Year Call for Nominations	August 2021
Chapter Leader Exchange	September – October 2021, Virtual
Global Health Equity Week	October 25-29, 2021
Chapter Leader Event at HIMSS Global Health Conference & Exhibition	March 14-18, 2022, Orlando, FL
Chapter Fiscal Year 2022 Ends	June 30, 2022
Year-End Advocacy Recognition Form Due	July 1, 2022

Recognition

HIMSS recognizes chapter advocates for their efforts through a Year-end recognition and short-term advocacy challenges throughout the year. The Recognition Program consists of the following:

Year-End Chapter Advocacy Recognition

At the end of each fiscal year, Chapter Advocates may apply on behalf of their chapter for a Level of Advocacy Recognition. HIMSS presents a HIMSS Chapter Level of Advocacy Insignia of honor to Chapters as a direct result of their Chapter Advocate's leadership and commitment to advocacy.

The levels include Level 1: Advisor, Level 2: Ambassador, and the highest level, Level 3: Changemaker. Submissions are due at the end of the Chapter's fiscal year (July 1, 2022). **For additional details, please refer to the [submission form](#).**



Chapter Advocate of the Year Award

HIMSS presents the Chapter Advocate of The Year award to a chapter leader who demonstrates exceptional leadership advocating for health information and technology. HIMSS recognizes one recipient each year at the HIMSS Global Health Conference. Learn more on the CLRA: <http://clra.himsschapter.org/>.

Additional Resources

- [Chapter Leader Resource Area \(CLRA\)](#): An internal site for Chapter Leader tools. All board members receive access. Once logged in, click on the 'Get Involved' dropdown, then click on 'Advocacy & Public Policy' or [click here](#). Besides this toolkit, additional resources on the CLRA include:
 - [Advocacy Day Toolkit](#) (Tips for organizing and executing Advocacy Days to meet with legislative offices)
 - Mentors: Task Force Chair, Vice Chairs, and additional volunteer mentors
 - [Meeting recordings and slides](#)
 - [Year-end Recognition Form](#)
 - ... and more!
- [Legislative Action Center](#): A tool to research, educate and take action at the U.S. federal and state level. Identify your elected officials, and track state legislation.
- [HIMSS Public Policy Center](#)
- Public policy [news](#) and [resources](#)
- [Chapter Advocacy Task Force](#)
- [Public Policy Committee](#)
- HIMSS Staff: policy@himss.org

Appendix

Virtual March Template

Many chapters choose to hold virtual campaigns on the [Legislative Action Center](#) in addition to or instead of their in person engagement. This allows your chapter the chance to influence policy, engage a wide range of members and improve relationships with officials. Once set up, any member of the public in your state, both members and non-members, can enter their address and send the letter to their district's legislators/officials email inbox automatically.

If you are interested, reach out to policy@himss.org or **complete the questionnaire [HERE](#)**, which includes the questions listed below. HIMSS is able to assist you in completing the form, upon request.

1. **Type of Campaign:** Write a Letter (send email – most popular); Call a number; Tweet at someone
2. **To whom should the message be sent?** State legislators, local elected officials, etc.
3. **Timing:** When would you like to begin and end the campaign? (Approximate dates)
4. **Name of Campaign** (Example: Florida HIMSS members: CALL TO ACTION; South Carolina Health IT Advocacy Days: A Call to Action!)
5. **Campaign overview:** This should be a catchy brief statement to grab members' attention. 1-2 sentences encouraging advocates to take action.
 - a. Example: South Carolina, Make your voice heard on the issues critical to redefining healthcare! Ask your State Legislators to advance healthcare workforce, telehealth, and broadband access)
 - b. Urge Your State Legislators to Enable Interoperable and Rapid Data Exchange in Florida
6. **Description:** This should encourage advocates to take action and describe the campaign and its importance.

Example:

HIMSS South Carolina Chapter and SCHIMA are collaborating this year to advocate for a greater focus on harnessing the power of health IT to transform the delivery of healthcare in South Carolina and address disparities in access to care. We ask that you help us raise awareness for three issues critical to advancing this change:

1. Improve healthcare outcomes and decrease care disparities by addressing policies and funding to accelerate bidirectional data sharing at the local and state levels. Bidirectional data sharing will vastly improve integrated care delivery and coordination across primary care, behavioral health, population health, and preventive care.

2. Continue to support South Carolina's groundbreaking work in telehealth by making all homes permanently reimbursable sites for telehealth visits. The generous support of the SC State Legislature has propelled the state to become a national leader in telehealth development and research. Improved payment for virtual care into the home will ensure ongoing sustainability of these innovative services into the future.
3. Support and expand the efforts of Palmetto Care Connections and the South Carolina Telecommunication and Broadband Association (SCTBA) to ensure that broadband access and necessary technologies are available to all South Carolina residents, particularly those in areas of need.

Thank you for supporting the public health surveillance enterprise! After taking action, please share this link with your peers and post to social media!

7. **Letter to Officials:** If you would like to write a letter (email), please provide the content of the letter. It can be draft, if you would like to discuss further. Please include both an Email Subject Line and Email body. Members will be able to optionally edit and personalize the letter, unless you determine it should not be editable.

Example

Subject line: Support Florida's Health & Human Services Data Modernization

Greetings,

As a constituent of your district, I am writing to urge you to support and pass SB 800 and HB 1171 Division of State Technology to modernize health & human services (HHS) data infrastructure to enable interoperable and rapid data exchange and provide for:

- Establishing the Data Innovation Program to ensure all state agency data are interoperable; minimize costs associated with data management; increase transparency; improve training; provide standardized data systems, policies and procedures; and increase state overall data standards, thereby translating data into actionable information;
- Specify requirements for data governance across state agencies, including the development of common data definitions and publish a data dictionary; and
- Develop and conduct data interoperability proof-of-concept pilot programs with the state's Agency for Health Care Administration, Department of Health, and the Department of Children and Families

The state HHS agencies all spend hundreds of millions of dollars maintaining these siloed data environments, often without working collectively across all HHS agencies to use the collected data as an asset of the state.

On November 11, 2019, Governor DeSantis issued a directive to the following Health and Human Service agencies: 1) Agency for Health Care Administration, 2) Department of Children & Families, 3) Department of Health, 4) Department of Education, and 5) Department of Management Services.

The Governor directed that a work group be established with the following goals: [...]

SB 800 and 1171 addresses the goals that the Governor has established regarding interoperability and proof-of-concept projects. I urge you to support and pass SB 800 and HB 1171 to modernize health & human services data infrastructure and to support 21st century interoperable data exchange. Thank you for your consideration.

Sincerely,

Name

Suggested Template

Subject line: Support _____

Greetings,

As a constituent of your district, I am writing to urge you to support and pass insert bill here (# and titles) to insert purpose of bills.

[Insert issues, background, context here.]

[Insert what the bills aim to do and stress the importance here. I urge you to support and pass insert bill here (# and titles) to insert purpose of bills. \]Thank you for your consideration.

Sincerely,

[Name placeholder]

8. Message after participating: This thank you message appears after taking action.

Example

Thank you for taking action to support data exchange by urging your State Senators and Representatives to support efforts to modernize the state's health and human services data systems.

Please consider sharing on social media. The following is a sample post:

I just urged my Florida State legislators to modernize the state's health and human services data systems. You too can make your voice heard through the @HIMSS Florida campaign! <https://bit.ly/38upUnw> #GovHIT

Thank you,

[Campaign Organizer and contact email]