

FACILITY TOUR GUIDEBOOK



PURPOSE OF THE GRASSROOTS PROGRAM

California Ambulatory Surgery Association (CASA) is the leading advocate for the ambulatory surgery center industry. CASA and its members advance communication and education to key political audiences including legislative and regulatory decision-makers.

This guidebook supports CASA's proactive grassroots program to educate Legislators about ambulatory surgery centers (ASCs) through on-site tours. The goal is to show the Legislator first hand the high-quality healthcare opportunities available at an ASC. It is not enough to just brief someone or simply conduct a facility tour; a Legislator needs information that will provide background and policy support for important decisions on healthcare issues.

The grassroots program will achieve the following goals:

- Educate Legislators so they understand the value and purpose of surgery centers to the residents of their districts.
- Demonstrate that the local center is a key part of the local healthcare network of providers.
- Deliver key messages to Legislators that will impact their views on healthcare policy.

Center tours provide an excellent opportunity to share your vision, approach and medical specialties with key audiences. This guidebook is a step-by-step guide to assist you in planning and executing a successful center tour and to help you reinforce CASA's key messaging on the healthcare industry and legislative issues.

This guidebook is intended for use of CASA members only. This book should be used to assist with tours that have been scheduled and organized by CASA. If you have any questions about any of the information contained in this guidebook, or would like additional assistance in planning or executing a center tour, please contact the CASA Executive Director.

Center tours will be focused primarily on state Legislators but may include, but not be limited to, members of Congress or local elected officials, media and other healthcare purchaser/payer entities. These diverse audiences will have a limited understanding of ambulatory surgery centers. Your information should be simple, concise and easily understood. Rather than providing too much information about medical procedures, your tour should focus on the value of surgery centers to the residents of their districts and the role of centers in the local network of providers. Legislators need to understand, from the patient point of view, the benefit of having a center in their area from a convenience, cost and specialty standpoint.

PROTOCOL FOR ARRANGING TOURS

The grassroots effort will be managed through CASA and KP Public Affairs. The team will identify the legislative targets and schedule the tours. In addition, our team will work with administrators to prepare the center for the tour, following the instructions in this guidebook.

KP Public Affairs will:

- Identify the Legislator and center for the tour.
- Contact the center administrator to secure a date for the tour. Note: Legislators are in their districts primarily on Fridays.
- Schedule a “pre-tour call” to discuss logistics and message points.
- Support the center with legislative follow-up.

Center owners and administrators will:

- Prepare the facility and staff for the tour.
- Conduct the tour.
- Notify CASA’s Executive Director and KP Public Affairs about details of the tour.
- Conduct follow-up with tour guest.

BEFORE THE TOUR

WHO SHOULD PARTICIPATE IN THE TOUR?

To the extent possible, tours should always be conducted by the physician partner(s) (i.e., medical director) and the administrator. We want to showcase the individuals that have the greatest knowledge of the center's operations, and distinguished visitors will understandably expect to meet with a representative at the highest level. It will be helpful to include additional center staff to provide support and pertinent information to the Legislator. The administrator shall note questions and issues that require follow up.

KNOWING GUESTS AND UNDERSTANDING THEIR INTERESTS

Visitors to a center will likely arrive with no background knowledge of ambulatory surgery centers. A successful tour will accomplish three objectives:

- It will convey and reinforce the overall mission and values of ASCs.
- It will engage the tour participant in a thoughtful, fact-based dialogue that brings attention to the value and unique offerings of ASCs and the role they play in the healthcare system.
- It will address legislative and other regulatory details, providing information that assists the Legislator in making key decisions on healthcare issues.

In order to meet these objectives, center representatives must have a

complete understanding of the guests before they arrive. Some questions to consider prior to the tour include:

- What constituencies do they represent?
- What committees are they members of?
- Do they have a healthcare background?
- Have they visited an ASC before?
- What are their concerns?
- What is the most important message that this specific individual needs to take away from the tour?

KP Public Affairs will provide the center with detailed information about the visitor prior to their arrival. During our “pre-tour call,” we will discuss other nuances the center should be aware of prior to the tour.



ASCs are the most cost effective solution for outpatient surgical procedures for patients, healthcare providers and the Medicare system.

PRE-TOUR CHECKLIST

- Coordinate with KP Public Affairs.
 - KP Public Affairs will work with the Legislator's office to arrange date, time and length of visit.
- Set up conference call with KP Public Affairs to prepare.
 - KP Public Affairs will provide the names and titles of participants, as well as bios of the visitor.
- Notify other center employees about the legislative visitor.
- Have someone prepared to meet tour participants when they arrive at the center.
- Ensure that bottled water is available if desired.

PRE-TOUR CONFERENCE CALL AGENDA:

- I. Introductions
- II. Tour Logistics
 - a. Date/ time
 - b. Guest
 - i. Biography- profession
 - ii. Legislative interests
 - iii. Other staff to attend
 - iv. Connection to medical community
- III. Key Messages for the tour
- IV. Tour route
 - a. What to show
 - b. What not to show
- V. Follow-up
 - a. Contacting the Legislator
 - b. Notification to CASA Executive Director and KP Public Affairs
- VI. Questions

CENTER TOUR AGENDA

PLAN A TOUR ROUTE

The tour should be well-planned, well-executed and carefully timed. Tours should last roughly 45 minutes to an hour, but should never be cut short if the visitor appears eager to see or learn more. Please leave time available to sit down and answer questions after the tour.

The physician partner(s) will be the principle guide for the tour. Greet the visitor in the entrance lobby (if applicable) and provide a general overview of the center, then escort the visitor through the center.

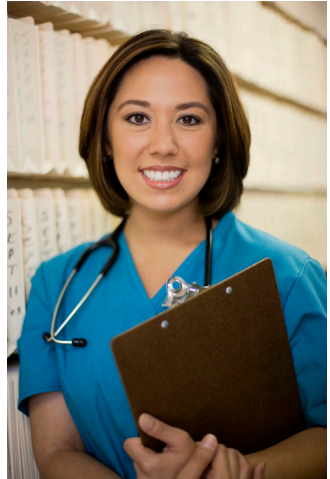
ROUTE SHOULD INCLUDE:

- Reception area
- Medical offices
- Operating room
- Recovery room
- Other – specific to each center

SHOWCASE CENTER'S ASSETS

Consider including:

- Architectural landmarks, if applicable
- Cutting-edge technology
- Specialty equipment



Please be prepared to speak about your center specifically but also about the ambulatory surgery center industry in California. You will be provided a message track and fact sheet that will include detailed information. Every Legislator that receives a request from KP Public Affairs on behalf of CASA will tour one facility. Therefore, your fellow ASCs may not have the opportunity to host. Please include information about other CASA members in the region so the Legislator knows the healthcare presence in his/her district.

At the conclusion of the tour, the visitor should have a clear sense of the role ASCs play in the community and the need for policy decisions that will provide greater funding and utilization of ambulatory surgery centers.

THE ROLES AND KEY MESSAGES OF STAFF IN THE TOUR

Physician Partner

The ASC physician partner(s) should explain the facility's history, their background and healthcare expertise and that ASCs are both cost effective and provide a higher quality of care. Include the following in his/her presentation:

- Physician Specialties/ Experience
- Ambulatory Surgery Centers
 - Modern healthcare facilities focused on outpatient surgical care
 - Small businesses
 - Creating jobs
 - Focused on a small number of procedures in a single setting
- Benefits to Patients
 - Lower cost
 - Higher quality of care
 - 92% patient satisfaction rate
 - Low infection rates
- Healthcare System Benefits
 - Savings to Medicare
 - Specialized care
 - Serve patients in a more efficient timeframe

Administrator

The Administrator should explain the facility's operations, services and patient information. Include the following in his/her presentation:

- Number of patients served yearly
- The types of procedures conducted at this facility
- Other operational activities
- Center's expertise

MATERIALS

Your visitor should leave the center with a tangible reminder of the visit. CASA will work with you to provide the appropriate handouts for your tour. Written background information is especially valuable for Legislators, who will keep it filed and will reference it when issues arise. Please be sure to share the packet provided by CASA at the end of your visit. In addition, please feel free to share center-specific information: brochures, staff bios, etc.



The Affordable Care Act implementation will bring as many as 4 million uninsured residents into the healthcare system – ASC's are prepared to be a cost-effective contributor to the system.

RESTRICTED AREAS AND CONFIDENTIALITY

As with all institutions, confidentiality of certain information is paramount. Please use great care and caution in the following areas:

Do NOT share or allow distribution of:

- Patient records.
- Data and statistics that have not been approved for release by CASA.
- Classified information on employees.
- Privileged company documents or internal company communications.

When in doubt, always err on the side of caution and/or consult with the CASA Executive Director.

Innovation and clinical advances have led the migration of surgeries and procedures from the inpatient setting to the less-costly outpatient setting.



And that's it! You've conducted a successful tour. You've presented your center in the best possible light. You've detailed the important messages about your good work and dispelled, to the extent possible, misinformation and misperceptions.

This should not be the last contact the Legislator has with an ASC, and we want to ensure they are thinking about the industry long after the tour. In order to accomplish this, we recommend that the physician partner(s) conduct follow-up:

- Send a thank you letter or email to the Legislator, sharing your appreciation for their time, their thoughtful questions and their interest. Offer yourself as a resource for future inquiries regarding ASCs.
- Provide any information that you promised to provide within a few days. Consider including a personal (direct) phone number for additional questions.
- Provide CASA's Executive Director and KP Public Affairs with honest and constructive feedback on the visit. Your input is critical for the long-term success of the program.
- Add the guest to a list of individuals who receive ongoing, positive information about the center and its activities.



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