

Kanter visits Capitol Hill.

Make your voice heard on the Hill

Advocacy veteran shares six tips for effective meetings with legislators.

Tim Kanter, immediate past president of the California Agents and Health Insurance Professionals (CAHIP), also known as NABIP California, has attended dozens of meetings with state and national legislators. What does it take for an effective meeting? An open mind, solid preparation and expecting the unexpected are excellent places to start, says Kanter, president of Get Benefits Insurance Services, Inc. in Thousand Oaks, California.

1 Don't be intimidated.

"A lot of times people are nervous meeting with legislators — I know I was initially," Kanter says. "But remember that the people you're sitting across from are just like you. They just happen to serve in politics."

Kanter says that 90 percent of the time, the conversations go well, and the visits are positive — even when the legislator has a different position on the issue than the constituent. "They're not your enemy," he says. "They're just people who have to make hard decisions, and our job is to try to make some of those decisions a little easier."

2 Respect staffers just as much as members of Congress.

Don't be discouraged if you meet with a young staffer rather than the actual legislator. Staff are responsible for educating members and driving the priorities of the office.

Kanter recently met with a staffer in the office of Sen. Alex Padilla (D-CA), who was interested in learning more about the impact of the recent Medicare rule.

"We covered all of our Medicare talking points and then she started asking us questions," he says.

What was supposed to be a 15-minute meeting turned into a 45-minute meeting — an amount of time a constituent would never get with the actual legislator. "I'm an agency owner, and I have a large amount of Medicare clients, so I had a great opportunity to address some of her questions," Kanter says.

3 Prep for your meeting.

Before your visit, take time to read and understand the issue's talking points. NABIP emphasizes the importance of speaking with one voice when meeting with legislators or being interviewed by the media. "Knowledge is power," Kanter says. He warns that you'll miss something if you try to wing it. And if you're participating in a fly-in, get together with the people attending your meetings.

"You need to sit down ahead of time and say, 'I'm going talk about the role of the agent, you're going to make the talking points on Medicare, you'll do the small-group issues,'" he says. "Once you do that preparation, it's really easy."



Kanter and peers visit with Sen. Padilla's staffer.


NABIP California board members and Kanter meet with Sen. Butler.

4 Don't assume members of Congress understand all the issues they vote on.

A few years ago, Kanter was explaining his role in delivering Medicare coverage to clients when his congresswoman asked a surprising question. "I said, as agents, we help people understand the difference between a Medicare Advantage plan and a Medicare supplement plan," he says. "And she stops me and says, 'Wait, what is the difference?' This is my congresswoman, who is nearing Medicare age and is voting in favor of or against things related to Medicare Advantage or Medicare supplement plans."

Kanter pivoted and spent the next five minutes educating her on the basics of Medicare. "It was a great conversation, and that is what we can bring to the table during these visits," he says.

5 Waive the flag of the role of the agent.

Kanter says it is common to meet with staffers or legislators who don't have a clue what an insurance agent does or understand insurance basics. "You're often meeting with a staffer who is 22 or 23," he says. "They went from being on their parents' insurance to being on insurance offered through their job, but they don't make any decisions about it. They knew what an auto insurance agent is, but a health insurance agent is a totally different world.

"We have to explain to legislators that we're walking our clients through some of life's most critical decisions regarding their health and finances."

6 Think of advocacy work as another way to serve your clients.

Through his volunteer leadership roles at NABIP, Kanter has attended dozens of legislative meetings over the years. He says he is active in advocacy because he views it as a way to serve his clients.

"I can serve my clients by helping them pick a plan or deal with a claim," Kanter says. "And I can also help my clients by meeting with their legislators and say, 'Do not support that so my client doesn't have an emergency medical bill,' or, 'Please support this bill so my client's situation is a qualifying event for Medicare.'"

Visit nabip.org/advocacy/policy-documents each month for timely talking points to use during meetings with legislators and their staff.