

Building Relationships with Members of Congress Facilitation Guide

Objective: After this training, trainees should understand the importance of building relationships with their members of Congress, especially through participating in face-to-face meetings with Congressperson or their staffers. Trainees should have a clear grasp of how to schedule, prepare for, and conduct a legislative visit, and should feel comfortable setting one up. They will practice their meeting skills and talking points for a PIH Engage legislative visit.

Training medium: This training should be facilitated with the “Building Relationships with Members of Congress” PowerPoint. Training includes time for discussions throughout. Slide notes are provided below.

Presentation outline:

- Review the “Building Relationships with Members of Congress” PowerPoint (slide notes below) (40 min)

Slide Notes for “Building Relationships with Members of Congress” PowerPoint Presentation

Slide 5: What is a Congressional Visit?

The answer is in the name – congressional visits (or “legislative visits”) are your opportunities to visit your Congressperson’s offices and meet with your Representatives, Senators, or their staffers. When we conduct a congressional visit, we use our voices and power as constituents to influence policies, positions, and priorities of elected officials.

A major goal of most congressional visits is to draw attention to an issue and to direct your legislators towards a solution you present. Congressional visits for global health draw attention to the inequities in global health systems, and the national PIH Engage campaign helps us craft an “ask” – a proposed solution – to some specific issues related to those inequities.

Slide 6: Why visit?

Most United States citizens believe that the government spends around 27% of its budget on foreign aid. In reality, only 1% of the US budget is put towards foreign aid, and even less that towards global health systems.

Becoming an activist is one of the most powerful ways to support PIH and the movement for global health equity. As a constituent and educated citizen, you have the power to enact measurable change in both policy and funding for health initiatives. Members of Congress (“MOCs”) are key decision-makers in many of the choices that affect the everyday work of PIH at home and abroad. It is critical



that we take our message to MOCs to advocate for legislative decisions that enable health systems efforts to surpass current standards.

Legislative visits are an opportunity to persuade your representatives to support vital programs. When all of our PIH Engage teams across the country come together to deliver a unified, timely message to our members of Congress, we act as an effective force for change. Through collective action, we will harness the power of our communities to influence the people, policies, and programs that hold potential to advance the human right to health.

Slide 7: Why now?

The U.S. federal budget cycle runs year-round, with lots of key decisions happening in the late winter, spring, and summer. If we wait until the decision-making moments to start meeting with our legislators, we have less influencing power than if we start building strong relationships *now*. We don't want to miss important opportunities to put global health on our legislators' priorities. **We need to get into their offices now to make sure they know that we're holding them accountable to being champions for global health policies.** As we build the relationship over time and show that we care enough to come back again and again, our power will start to shift our legislator's place on the "champion scale."

Additionally, we need to start conversations now in order to determine how far we have to go! By speaking with our congressional office and learning about their priorities and positions on global health policies, we can place them on the "champion scale," figuring out how friendly they are towards the policies we are supporting. This helps us plan our next steps – while a "global health scrooge" might not even be worth spending lots of time with, even those who are friendly towards our policies.

Slide 8: Building Relationships with Congress

By starting to build relationship with our Congressperson, we can mount escalating pressure on them leading up to their appropriations work in the spring and summer. Showing up to an office once isn't effective; we need to show Congress that we are to stay and work with them for the long haul. Starting now means being able to have more substantive and influential meetings in the future.

Slide 9: What's in a visit?

Legislative visits are typically brief (about 20-30 minutes), and we need to do a lot in that time: During a visit, we want to show our constituent power, present a problem and solution, and make a hard ask of our legislator. We can call on our "EPIC" format to plan our meeting:

1. First, we want to **engage** our audience (the MOC or their staffer) with stories and statistics about our issue and our work, to start building the relationship.
2. Second, we'll present that **problem** at hand, explaining the issue of concern and its causes.
3. Next, we'll **inform** the attendees on the solution, explaining that the problem has a solution they can help enact.
4. Finally, we'll **call them to action**, making a hard ask for them to take a specific action to support our proposed solution.



Slide 11: How to Schedule a Visit

The first step in scheduling a legislative visit is deciding who we should be meeting with. Every U.S. citizen has 2 U.S. Senators and 1 Representative. With a little research, we can find out some background on our legislators' political histories and priorities. It's important to know what committees they sit on, and what their voting history has been on relevant issues. PIH Engage staff are also there to help us understand if one of our legislators plays a particularly important role in a current campaign issue.

Slide 12: How to Schedule a Visit

The next step is to decide when we'd like to meet with our Congressperson – it's a good idea to offer a specific date or date range when you request a meeting. The National Team at PIH Engage will help determine when is the best time to deliver a particular message to Congress based on the timeline of certain legislative processes. It's also important for us to do a little research to find out when important hearings or votes are occurring.

Based on the national campaign timeline, we'll choose a strategic time when we can turn out a strong showing. Though only one person is *required* for a meeting, more people means more power – you'll look more impressive, your voices will be heard louder, and you will feel more supported! (It's also more fun with friends!) We can even consider inviting other allied organizations that support the work of PIH to join, so long as they agree to be on message.

In order to get a meeting with the legislator themselves, we'll have to ask for a meeting while they are on recess – otherwise they will be in D.C. More likely though, we'll be meeting with the district staffer, and can conference call in the appropriate global health staffer from D.C.

Slide 13: How to Schedule a Visit

For those in charge of getting a meeting scheduled, try to start the scheduling process early; about a month in advance if you can. The first step is to visit the Congressperson's website and see if they have a meeting request tool online – if so, fill it out! But *always* follow it up with a call directly to the office location you plan to visit. (*Make sure you have the local office number; unless you're planning a trip to D.C., double check!*) An online form can take many weeks to get considered, and being persistent over the phone and email will help speed up the process. If you are told that it may take a week or two to get scheduled, don't give up! Continue to check in regularly over the phone and email until the meeting is on the books.

It is relatively unlikely that you will be able to get a meeting with Senators themselves, and Representatives (while more reachable) can also be hard to nail down. That's okay! If the Congressperson is unable to meet with us, we can have an effective meeting with a staffer. It's always a good idea to ask to conference in a staffer from the D.C. office (on the phone) who works on global



health, or a more specific topic if relevant to the campaign. This helps the issue and our ask move up the chain faster than meeting solely with a local staffer.

When you email the scheduler or the staffer with whom you'll be meeting, mention who you are, who you represent (your PIH Engage team), who will be attending the meeting (e.g. 4 members from PIH Engage and 2 representatives from GlobeMed), and what issue(s) you'd like to discuss. Near the date of the meeting, remember to call or email to confirm the date and time.

Slide 14: Meeting Preparation

Before scheduling the meeting, we should have already completed some basic research on our congressperson and gotten commitments from PIH Engage members and any others who will attend the meeting. It's always a good idea to re-confirm once you have a final time and date.

Once a meeting is scheduled, it's also important to check in with our coach on the PIH Engage National Team. They'll help with any tweaks in messaging, and will make sure that we're coordinating effectively across the network.

Leading up to the meeting, we'll set an agenda (based on talking points provided by the National Team), assign speaking roles, and practice in a mock meeting before the real thing! We'll also need to print our leave-behinds – the documents with background information that we leave behind with the office staffer.

Slide 16: At the Meeting

At the meeting, it's important to make a connection and start or strengthen the relationship we have with that congressional office. One important piece of this is to thank the Congressperson for their time and any supportive actions they have taken in the past. It's also typical to start off with a round of introductions, explain who we are both as constituents and as PIH Engage, and to share a story or anecdote about why our issue is important to us and others– and why it should be important to our legislator!

Our goal at the meeting is to get the Congressperson or their staffer to commit to taking a specific action, and to have a clear plan to follow-up on progress towards that action. To do this, we'll need to concisely state the problem and our solution, and make a clear ask of the office. We'll use the "EPIC" format to make sure we cover it all!

Finally, no one should leave the office without having a clear plan for follow-up. Will we schedule another meeting to discuss these issues further? Are there any lingering questions for which we need to find answers and get back to the staffer? Did we mention an article we'd send them? If they made a commitment, how will we be in touch to find out if they took their promised action? If they did not make a commitment, what other information do they need to make a decision?

Everyone should have a spot on the agenda, if only to introduce themselves. We'll need people to:

- Introduce PIH and its work, and PIH Engage as a network
- Discuss the background and importance of our current campaign issue
- Tell a story or share an anecdote to impress the importance of our issue
- Make the hard ask
- Take detailed notes in order to report back and follow up
- Be the point person at the meeting, and be in charge of follow-up (it makes sense for this to be the same person who contacted the staffer to schedule the meeting)

Slide 17: At the Meeting

During a legislative visit, remember to:

1. Be confident: You are the expert! It is natural to be nervous, but remember that it is their job to meet with you and listen to you concerns!
 - a. If you are asked a question you are unprepared to answer, simply let them know that you will check with the National Team and get back to them – and then do that! It's okay not to know everything.
2. Be clear: Don't beat around the bush or ask vague questions. Give a clear call to action and ask for a very specific commitment from whoever is meeting with you. Building relationships is important, but a good relationship without any action isn't useful.
3. Leave with a plan: Make sure that both you and the office understand the next steps you've both agreed to take; review them before you leave. Make sure that you have detailed notes from the meeting to that you can properly follow up and report back.
4. Collect business cards! It's great for the office to have your contact info, but it is useless if they don't contact you. Make sure that you collect the contact information from everyone at the meeting so that you know who to follow up with. If you meet with more than one staffer, start building a database of congressional contacts for your team to use in the future.

Slide 18: At the Meeting

If you have a meeting with a staffer but the Congressperson is around in the office, ask if they can step out for a moment to take a picture with your group. While you get situated for the photo, this is a great time to make a quick introduction and slip in your firm ask to the legislator themselves.

Even if the Congressperson isn't around, take a picture with your group and the staffer and share it with the National Team so that we have documentation of all our work!

Slide 19: After the Meeting

It's impossible to talk enough about the importance of follow-up, so it gets its own slide!

Without follow-up, it's like a meeting never happened. Someone needs to be assigned to lead the follow-up process, starting directly after the meeting. In a short email afterwards, thank the staffer(s) and/or Congressperson for meeting and remind them of the next steps you both promised each other. If they later follow through with a commitment they made during the meeting, thank them again. If



they had a question you couldn't answer, ask the National Team or do some research and then get back to them. Keep up with them often to see if they've followed through with their commitments, and provide pressure and guidance as needed.

Remember that the first meeting is just the beginning. Most of our work will be done through follow-up: emails, further meetings, calls, actions, and escalating pressure to remind them that we are here for the long haul, and that we will keep them accountable.

Remember also that we are not in this alone! We have to report all our meeting activity back to the network so that we can plan for the next step in the campaign together.