Partners In Health ENGAGE

Meeting with Congress Toolkit

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What are Congressional Visits?

The answer is in the name – congressional visits are your opportunities to visit your Congresspeople's offices and meet with your Representatives, Senators, or their staffers. When you conduct a congressional visit, you use your voice and power as constituents to influence policies, positions, and programs of elected officials. A major goal of most congressional visits is to draw attention to an issue and to direct those officials who serve your districts towards a solution you present. Congressional visits for global health draw attention to the inequities in health systems across the globe, and PIH Engage will help you craft an "ask" – a proposed solution – to some of these specific issues.

Why do Congressional Visits?

The belief that health is a fundamental human right is at the core of Partners In Health's mission. We have evidence that people living in poverty can successfully be treated for both complex and preventable diseases, yet hundreds of millions of people still lack access to quality care. As an organization, we strive to do whatever it takes to provide high quality healthcare in communities around the world in order to advance global health equity and social justice.

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 than that towards global health programs.

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 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 members of Congress to advocate for legislative decisions that enable health systems efforts to surpass current standards.

Congressional visits are an opportunity to persuade your representatives to support vital programs, and will also serve as an educational tool for you and your team; you will learn about important political processes and become a better informed and more active citizen. When all teams 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. This year, with nearly one hundred PIH Engage teams, we can mobilize for global health equity on a greater scale than ever before.

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How to schedule a congressional visit

Step one: Decide what congressperson you'd like to meet with

You have two senators and one representative. Do some research to find out who they are and their political history and priorities. Look up what committees they sit on, and what their voting history has been on relevant issues. Talk to your coach to find out if someone in your area has a particularly important role in a current campaign.

Step two: Decide when you'd like to meet with your congressperson

The National Team at PIH Engage will help you determine when is the best time to deliver a particular message to your congressperson – this timing will take into account the timeline of certain legislative processes. Attend webinars and check with your coach to find out more about specific campaign timelines. You should also do research with your team to find out when important hearings or votes are occurring (a simple Google search and your Congressperson's official website will get you far!).

Once you understand the campaign timeline, decide on a strategic time when you can turn out a strong showing. Though only one person is *required* for a meeting, more people means you feel more supported and your message is heard louder (It's also more fun!). Talk with your team to find a variety of dates that might work, and consider inviting other allied organizations that support the work of PIH and PIH Engage.

If you are trying to meet with the legislator themselves, make sure to ask for a meeting while they are on recess – otherwise they will be in DC. You can find the recess calendars for the House and Senate online (on the house.gov and senate.gov websites), and ask the office when your representative will be in their local office when you call.

Step three: Set up a meeting with your congressperson

1. Call your congressperson's office to schedule a meeting. Make sure that you are calling their local district office – find the one nearest you on their website! The main line listed may be for their office in Washington, D.C., so unless you're planning a trip, double check.
    a. Check the house and senate websites to see when congresspeople are in Washington, D.C. and when they're at home (www.house.gov, www.senate.gov)
2. 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. This is okay! If they are unable to meet with you, you can have an effective meeting with their staffer. You can 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.
3. You may be asked to email a scheduler. If so, make sure to follow up by phone continually until the meeting is scheduled! If you are having trouble, ask your coach for guidance.

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4. When you email the scheduler or staffer, mention who you are, who you represent, 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, call or email to confirm the date and time.

How to prepare for a congressional visit

1. **Do some basic research** on your congressperson. Knowing about issues and populations that are important to them will help you tailor your message to their interests.

2. **Decide who is attending the meeting**. Get firm commitments from PIH Engage team members, and any other allied organization's members who are interested in attending. If at all possible, try to have a delegation of constituents who vote in the district (we recognize that this is sometimes more difficult for students at universities). If you are not from within the district, you are not required to divulge this voluntarily, but do not lie if asked.

3. **Check in with your coach**, and review webinars and toolkits. Communication from the National Team will allow you to craft a clear ask for your meeting. You should also check in with other teams in your area (if there are any) to make sure that you are delivering the same ultimate message and using your numbers to follow up on each other's meetings and hit multiple important offices.

4. **Set an agenda**. During your meeting, you'll want to address a number of key points. See the following pages for a sample agenda and use it as a template.

5. **Assign speaking roles**. Everyone in the meeting should introduce themselves at the beginning. Specific people should be assigned to introduce PIH and our work, and PIH Engage as a network, discuss the background and importance of our current campaign issue, and make the firm ask. Story-telling or sharing anecdotes should also be specifically assigned. Knowing who is speaking, what they are covering, and in what order will make the entire process smoother, and you will feel more confident.

   Also assign at least one person to **take detailed notes** in order to report back to your coach and the network, and to debrief and follow up after the visit.

6. **Practice**! Once you've assigned speaking roles, run a mock visit. Have each person practice their piece of the meeting – even introductions! – and make sure they are clear, articulate, and within reasonable time constraints. This will help you feel and sound more confident the day of the visit. It may seem silly, but *don't skip this* step!

On the day of the meeting, arrive a little early so you can go over your roles again before walking into the office. The sight of activists prepping for meetings in hallways is a common one; it's a great way to re-affirm your confidence before you take the stage!

7. **Print your leave-behinds**. The PIH Engage National Team will provide basic material for you to leave with your congressperson/their staffer that includes our key message. Pass this material out to the legislator and/or staffers in your meeting, and reference it while you present the issue. It's always safe to have extra copies just in case!

8. **Breathe**! It's normal to feel a little nervous, especially before your first visit. But if you've prepared well, practiced your part, printed your materials, and have a strong delegation, you'll be ready to go.

At the meeting

1. **Be confident**. You are the expert. Don't worry if you are nervous; it is their job to meet with you and listen to your concerns!

   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. **Take notes**. Without detailed notes, you won't have the necessary material to properly follow up and report back. Record the tone of the meeting, and questions or concerns, and any commitments made by the congressperson, staffer, or your team.

3. **Collect business cards** of the staffers with whom you're meeting. If you meet with more than one staffer or office, start building a database of congressional contacts for your team to use in the future.

4. **Make a plan to follow up** through email, phone, or another in-person meeting. If they've committed to an action – signing a letter, calling a colleague, etc. – decide at the meeting how you will know if they've followed through.

5. **Take a picture**! If you had a meeting with a staffer but the congressperson is around in the office (on recess from DC), ask if they can step out for a moment to take a picture with your group. While you get situated for a photo, this is a great time to make a quick introduction and slip in your firm ask to the legislator themselves.

   Send your pictures to engage@pih.org

After the meeting

1. **Follow up** with the legislator and/or their staffer(s). This is very important! Without follow-up, your efforts are for naught. Assign someone on your team to lead the follow-up process.
   In a short email afterwards, thank them for meeting with you. 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 your coach 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.
   Your 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.

2. **Report back** to the network so that we can keep track of all our communications and headway throughout the network. Without knowing what everyone has done, we can't plan for the next step in this campaign! Share feedback with your coach on coaching calls as well, and let other teams in your area know how the visit went.

Tips for getting email read:

1. **Be Timely –** send an email to set up a meeting a week or two out at most. It's tempting to think of the meeting as an event to plan a month ahead, but to staff a closer date is easier to manage.

2. **Include Relevant Data-** Staff scan the email looking for little pieces of data that are important to them. Is the main point of your meeting to talk about PEPFAR? Say so, and also illustrate the importance of global AIDS with a fact or two (like we currently have 15 million people on AIDS treatment worldwide).

3. **Work on the subject line -** The subject line should be short and sweet. Make it 6 words or less, and right to the point. A Pro tip for this one: try to work in the word "invitation" staffers think there might be an offer for food in the email and are more likely to open it (no, you don't have to *actually* give them food).

4. **Keep it Short –** Take the time to craft very short email. If you have to scroll more than twice, its too long. Most staff will read this on a phone, so keep that in mind. Don't take this lightly, Mark Twain once said, "I would have written you a shorter letter, but I didn't have the time."

5. **Always include links –** Link to relevant articles on the topic, and definitely a link to engage.pih.org, so they can explore who we are (plus it provides some legitimacy). You want links to our briefs and/or your leave behind so that the staffer can put this all into a briefing packet later.

6. **Don't send attachments –** Attachments can make it more likely for an email to get flagged in spam. If it's not flagged in spam, many times attachments are not opened for one reason or another. If *you have* to send an attachment (say a leave behind after a meeting) make sure it is a PDF, not a word document.

7. **If you don't get a response –** Reply to your own message with a brief note: "I just wanted to be sure you saw this message, I would like to schedule a meeting with your office next Wednesday or Thursday to talk about global AIDS funding priorities."

Sample Agenda

1. Introductions

Everyone at the meeting should get the chance to introduce themselves, their role in PIH Engage or the organization they are representing, and why they care about these issues.

A specific member should introduce Partners In Health and our mission and work.

2. Acknowledgements

Take a moment to acknowledge your member of Congress for any previous action or on relevant issues. If they have been a champion for global health in the past, let them know that you appreciate it – and look forward to their critical ongoing support! Even legislators are people; everyone likes to feel appreciated and needed.

(If you are meeting with a staffer, you can let them know you appreciate their boss and office. If you know that particular staffer was important in previous efforts, you can of course thank them personally as well.)

3. Presentation of issues

This is your chance to discuss the issues for which you are there to gain support. Keep things clear and concise. Use personal anecdotes and/or stories from PIH's work; storytelling can be a very powerful tool to show the importance of your request. This is a perfect time to reference your leave-behind material.

4. Making the ask

Make a clear, targeted request for them to take some sort of action. You should work with your team and coach, using materials provided by the National Team and your own research, to come up with a tailored ask for your congressperson that pushes forward our unified network-wide legislative goal.

Ask for their answer immediately. If they are unwilling to make a commitment, set a date to follow up. And don't forget to record questions, objections, promises, or concerns.

5. **Plan for follow-up**
   During the meeting, make a plan for how you will follow up on any commitments made from either side.