



**Partners
In Health**

ENGAGE

Building the **Right to Health** Movement

Building Relationships with Your Members of Congress

- Opening discussion
- What is in a Congressional Meeting
- How to Schedule/Run a Meeting
- Building and Maintaining the Relationship
- Common Challenges
- Your Turn!
- Resources

**What is important when
beginning and maintaining a
successful relationship?**

Answers to emphasize:

- communication!!!!
- consistency
- respect

Who has met with their congresspeople in the past, pre-Hill Week? For Hill Week?
How many times?



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.

- Use our constituent power
- Influence our legislators
- Mobilize for global health inequity

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

Emphasize that these meetings are totally possible and do-able, our MoCs work for us so while it is intimidating, they are obligated to meet with us and that is where we can make real change.

We meet with MoCs on all points of the political spectrum and here's why:

- Extreme opposers
- Moderate opposers
- Moderate supporters
- Extreme supporters (Champions)

E-Os: They will likely not listen but at least they know there are constituents who do not agree (can't defund something because no one met with them/expressed that they support it)

M-Os: Possible to change their minds

M-Ss: ask/get them to be champions

E-Ss: provide evidence/numbers/support to their work, inform them of new things to champion/new information to consider

- Build relationships
- Show power
- Find out where they are on the champion scale



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.

. 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.

EPIC:

Engage - Build a Relationship

Problem - Global Health Funding is in a serious crisis

Inform on a Solution: They can help!

Call to Action - Here's how...

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



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How to Schedule a Visit

1. Decide when to meet with MoCs strategically
2. Start **EARLY**
3. Call/email your congressperson's local office
4. Be **persistent!**
5. Ask to conference in relevant DC staff

1. 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.
 - a. 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.
 - b. 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.
2. For those in charge of getting a meeting scheduled, try to start the scheduling process early; about a month in advance if you can.

1. 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!*)
2. 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.
3. 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.
 - a. 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.

To Do List:

- Background research
- Decide who is attending
- Check in with your team's coach
- Set an agenda
- Assign speaking roles (and practice!)
- Print leave behind

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.

EMPHASIZE THE IMPORTANCE OF NOTE TAKING

Anatomy of a Meeting:

(Example from our Summer/Hill Week Advocacy)

LOBBY MEETING AGENDA

* make a copy of this document for your meeting.
Meeting report form

SECTION	TIME	TALKING POINTS	PERSON
Meeting Launch + Thank you	5 min	<ul style="list-style-type: none"> Thank the MOC office for hosting us for this meeting Introduce the PIH, group and who we are (see example facilitator script) Explain our purpose of the meeting Ask the address to introduce themselves 	PIH Team Lead
Group Intros	5 min	<ul style="list-style-type: none"> Introductions: Name, location, one sentence about why each person cares about the cause (30 seconds or less) Facilitator be prepared to help keep the introductions moving & call on people to go next 	
Personal Story Sharing	7 min	<ul style="list-style-type: none"> 2-3 team members will deliver personal stories of 1-2 minutes per person (see supplemental tool for determining a personal story) Try to link your story to a demand, and include a suggested talking point. Facilitator will help transition between stories 	
The ASK + discussion	10 min	<p>(optional) pull talking points to help you articulate the issues or from the 1-page "leave-behinds" tool</p> <p>pause after each ask to see what the MOC/Staffer thinks</p> <ul style="list-style-type: none"> Ask the aide if they have any questions about our demands A great question to always ask: "Where does the Congressperson stand on these issues?" 	
Closing	3 min	<ul style="list-style-type: none"> Thank them for their time, ask to schedule a time for a follow up call You can close with a line like: "A pandemic is not over anywhere until it is over everywhere" or "We are as vulnerable as our least protected neighbor" "Thank you to you and Representative _____ for everything you are doing. We are grateful for the time you took to meet with us today; we know this is a hectic and stressful time for everyone. We hope you and your loved ones stay safe and that you will stand with our cause." 	

ADDITIONAL MEETING ROLES	PERSON
Facilitator	
Timekeeper (confirm how much time we have at the beginning of the meeting)	
Notetaker/Quote-capturer (take notes & capture impactful quotes)	
Photo-taker (take a few screenshots throughout the meeting, ask permission for us to share it)	
Follow-upper (email the congressional office right after the meeting with another thank you, our demands, supplemental documents, and the photo of the meeting)	

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)

- Thank Congressperson for time and supportive action
- Connect on a personal level
- Make a plan for follow up
- Be confident and clear
- Take notes
- Leave with a plan
- Provide a leave-behind and collect business cards
- Take a picture!

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?

1. During a legislative visit, remember to:
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 your 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 so 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.
5. 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.
 - a. 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!

- Practice with and without cameras
- Set an expectation for your team to RSVP to meetings
- Be engaging and clear
- Have one person be the ‘facilitator’
- Utilize the chat option to share docs/links

Having a facilitator will help keep the meeting organized so people are not talking over one another - hard to read the natural flow like it would be in person

How did Hill Week go?

**What are some challenges
you have faced meeting
with MoCs?**

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Create discussion over this slide and the following, brainstorming solutions

- Unengaged, unresponsive staffer
- “Politics of Delay”
- Unsupportive staffers/MoCs
- Vague responses to Asks
- Unresponsive to emails

The Key to Building/Maintaining the Relationship: **FOLLOW UP!!**

- Plan to speak with their office **several times**
- In future advocacy campaigns try to communicate with the same staffers
 - Mention previous communications so they remember who you are
- Report back to the network using the reporting form

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.

- Make good impressions and be friendly so that they are more likely to respond to you in the future
- Be personal and memorable in your conversations so they are more likely to remember you
- Every email/call should include an actionable item
- Reference previous meetings

- Get to know who is most helpful on the staff
- Do not underestimate a staff's influence with the MoC
- Connect with MoCs in other ways
 - Town Halls
 - Campaign Events
- Find connections in your own network

Get to know the "family." Meet in person with the Member's staff. Putting a face to an issue is essential. As one congressional staffer stated, "nothing replaces face-to-face interaction."

Don't undervalue the staff's influence on a Member. Getting to know a District Director or the legislative assistant that works on your issue is imperative for connecting with a Member. Be kind to them (and the rest of the staff) and consider their needs as well as yours. Small details like providing materials in advance, articulating how a decision will impact the district, and arriving on time for a meeting can make or break a budding relationship.

Find connections in your own network. If you live in the Member's district, chances are that you have a connection to the office. CMF President Brad Fitch often tells the story of a doctor upset about a new regulation in Congress but unsure of how to voice her concerns. The doctor discovered that her daughter's friend's mother went to college with a current Member of Congress, so she called this acquaintance to see if she could put her in touch with the Member's office. Fast forward a few weeks, and the doctor had a meeting with... Senate Majority Leader Trent Lott. Connections don't have to come through membership of giant constituent organizations. They can be small, everyday interactions that offer an "in" where others don't.

Meet the Member half-way: Attend town halls, schedule site visits, and participate in events at which the Member will appear. Repeated interaction not only makes the Member aware of your issue, but also demonstrates your personal investment in forming a relationship with that Member.

- Recap what was discussed in the previous meeting and follow up emails
- Share new stories of self or share a story of us/now
- Present any new asks you may have
- Ask the follow up questions
- Closing/plan for further follow up



Example Follow up Ask

New Ask

Sign Dear Colleague Letter on global funding for addressing the COVID-19 pandemic

In early July, Senator Rubio (R-FL) and Senator Cardin (D-MD) wrote a Dear Colleague Letter on global funding for addressing the COVID-19 pandemic. As you mentioned Senator Cantwell's support of global funding in the previous meeting, we would like to ask Senator Cantwell to sign onto this Dear Colleague Letter. [Link](#) Can we count on Senator Cantwell to sign onto this letter?

Q1

Global Funding for COVID-19

Previously, you mentioned that you would need to connect with your colleagues to have a better idea of Senator Cantwell's stance on global funding for COVID-19 and other international policies. Would you be able to update us on what you were able to hear from your colleagues and Senator Cantwell on our ask to **Allocate \$12 billion for a Global Pandemic Prevention Program to support low-income countries to develop and implement their own plans to prevent outbreaks and stop international disease transmission.**

Q2

Contact Tracing and Testing

In the previous meeting, you mentioned that Senator Cantwell was supportive of the HEROES Act and **allocating \$75 billion contact tracing and testing.** One component of our ask on contact tracing is to hire from within the unemployment pool. Can you tell us where Senator Cantwell stands on this aspect of our ask?

Here you see why good note taking is so important!!!!

“Build a long term, respectful and sustained relationship with your members of Congress. **It is the best way to get them to do the right thing.** Even if you disagree with them on most issues, the value of building a relationship with their office cannot be overstated.”

~ *Theo Sittler*
FNCL Peacebuilding Lobbyist

1. Who are your team's local representatives?
2. Who represents the members of your team?
3. How many MoC meetings will you aim for this year? How will you set this target?
4. Where else can you access your MoCs?



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Key Takeaways for MoC Relationships

- Thoroughly prepare for the initial meeting
- Be personal and have a clear call to action
- Follow-up!!!!!!
- Identify a point of contact on the staff who will be helpful in the future
- Think long term



Advocacy Resources

All resources can be found at
pih.org/engage

- You will find
 - Advocacy Campaigns
 - How to Contact MoCs/Run a MoC Meeting
 - Other Related Advocacy Materials

- <https://www.pih.org/sites/default/files/EngageBrowser/Advocacy/TI%202018%3A%20Building%20Relationships%20with%20Congress%20Notes.pdf>
- <https://cqrcengage.com/catholichealth/file/kEm7p7cW6Dh/Building%20Relationships%20with%20Legislators.pdf>
- <https://www.fcni.org/updates/the-importance-of-building-relationships-with-congress-855>

**REMINDER: Please rejoin
the main zoom group and
rename yourself with your
small group letter before
you take your break!**