

District Visits Guide

This guide outlines essential steps to organizing visits with Members of Congress or their staff in their home districts/states during Congressional recesses. It is vital that we communicate to Congress the importance of federal investment in science. *Note: This is a framework to start from, so adapt the topics and logistics to your groups' needs.*

Step-by-Step Guide for a Team Leader Organizing a Group Visit:

- 1). Set up Meeting with District Office
- 2). Serve as a liaison with the remainder of your team and communicate with them regarding meeting details once a date/time has been set.
- 3). Participate in a teleconference with your team to establish goals, talking points and what material(s) you will bring to the meeting.
- 4). Do your Homework!
- 5). Follow up with a Thank You letter to the Representative/Senator and/or Staffer
- 6). Submit a short summary of the meeting to relevant stakeholders.

STEP ONE: Set up a Meeting with the District Office

Scientific societies or your institutions can often provide you with contact information regarding the name of the scheduler for your congressperson to contact for the in-district meeting.

- Send an email (see below, for an example) to the scheduler requesting a meeting and include your name and contact information; where you live; who will be attending the meeting as part of the team; and the issue you would like to discuss. If you have met with them before, let them know.
- It's okay to be persistent and follow up in a week, if you do not hear back from the scheduler. Contact the scheduler in the legislator's district office and tell them you are following up on a meeting request sent on a specific date.
- Be flexible and bear in mind that Members of Congress keep very busy schedules, even when they are in their district. If the scheduler offers for you to meet with a staff person rather than the Member of Congress, please accept the meeting.

SAMPLE EMAIL FOR SCHEDULING VISITS

[DATE]

The Honorable XX

Attention: Scheduler
[District Office address]

Dear [SENATOR/REPRESENTATIVE] XX,

As a constituent living in [city] and a scientist, I am writing to request an appointment with [SENATOR/ REPRESENTATIVE XX] in [NAME OF DISTRICT OFFICE] on [DATE]. I am part of a team of local scientists from [NAME OF STATE OR DISTRICT] that would like to discuss the importance of federal investments in research and its contribution to our nation.

Please contact me to let me know when the [SENATOR/REPRESENTATIVE] or a relevant staff member might be available to meet. I will follow up with you in the next week by phone. Thank you for your consideration and I look forward to hearing from you soon.

Sincerely,
[NAME]
[CONTACT INFORMATION]

STEP TWO: Reach out to your team

Once a meeting has been set, reach out to your team members to communicate any details that are necessary and available at that time. If a date/time has not yet been finalized with the scheduler you may still move forward with a teleconference with your team to discuss goals and strategies. The teleconference could serve as an opportunity to discuss how to finalize a meeting.

SAMPLE EMAIL:

Hi Team [STATE NAME]!

I have confirmed a meeting for our group with [ENTER NAME OF CONGRESSMAN OR SENATOR] in their [CITY LOCATION OF OFFICE] office. Please find the details for the meeting below.

Meeting Details

Date: [DAY, DATE, TIME]
Meeting with: [NAME OF STAFFER]
Location: [NAME OF REPRESENTATIVE/SENATOR]
Name of District Office (e.g, Albany District Office)
Address
City, State, Zip
Parking: Example: Lot next to building
Security: None (NOTE: Some buildings may require that you go through security.)

I would like to schedule a teleconference with our team on date/time so that we can discuss our goals, talking points and materials that we would like to bring to the meeting. [USE [DOODLE POLL](#) OR WHATEVER MECHANISM YOU PREFER.]

Here's a little information about our fellow [NAME OF STATE/DISTRICT] Team meeting group members.

Name	Affiliation	Discipline	Position	Science Society represented

Once we've set up a date/time for a teleconference, I will follow-up with more detailed information on training webinars and talking points with the meeting.

Sincerely,

[NAME]

[CONTACT INFORMATION]

STEP THREE: Set up a Pre-Meeting Teleconference

Set up a teleconference with you and your team to discuss goals, talking points, creation of one-pagers, and to answer any questions that the team may have.

FOLLOW UP EMAIL FOR TELECONFERENCE

Hi Team [STATE],

We will hold a teleconference to prepare for the District Visits on [DATE/TIME]. To prepare for the teleconference, here are some materials that will aid in having a successful meeting.

Talking Points: AAAS has prepared a series of talking points that may be helpful for our team in preparing for our meeting. The attached document provides tips on how to frame the meeting, ways to keep our audience engaged, and suggested talking points that we can utilize to describe how the recently released FY 2018 budget would negatively affect science and scientific research. You may also find these additional resources and fact sheets helpful when crafting your message:

- American Institute of Biological Sciences [fact sheets](#) on NSF funding in each state.
- American Geosciences Institute [factsheets](#) which show the role of the geosciences in each state.

Please let me know if you have any questions or concerns. If you have any questions on the day of the meeting, please feel free to reach out to me via email, or contact [SOCIETY NAME] at [ENTER EMAIL OR PHONE NUMBER].

Best,
[YOUR NAME]
[CONTACT INFORMATION]

Talking Points on the Federal Budget

How to Frame Your Presentation

Goal: You want to develop a message that helps you to control timing; remember key points; speak without notes; avoid jargon; stay on point; be concise; answer questions; and expand on thoughts.

A clear message also helps your audience. It helps your audience pay attention, focus on you, and really think about how your points relate to them. It will also stimulate questions, help them dig more deeply into your content and make connections to their own interests. Your audience may also be able to repeat your messages more easily to friends and colleagues later.

Organizing principle: Keep it Miniature. Keep it Memorable. Keep it Meaningful!

- **Miniature:** Allows the message to be easy to remember. In order to make your messages both miniature and scalable, we recommend organizing them around 3 key points (words/phrases) that can act as an outline. This then becomes your scaffolding upon which to build your broader message.
- **Memorable:** Give them cues to make it easy to remember you. Use stories, visuals, or analogies to present complex information in easy to a memorable format.
- **Meaningful:** How research is meaningful to you in a way that can be conveyed with passionate enthusiasm. But it should also be meaningful to your audience and what matters to them.

Examples of Talking Points on the Federal Budget

NOTE: You do not need to memorize this, but use these talking points as a framework for providing your own personal voice on the importance of federal research investments. Create a One-Page Leave Behind document to present your message. See attachments for an example of a one-pager and a blank template to create your own.

Innovation is an American Imperative. Our nation's research enterprise is among the most powerful engines for American prosperity. One of the consistent areas of bipartisan agreement over the past 70 years has been the importance of the federal government's role in supporting research and innovation.

America's research and development (R&D) enterprise has made our nation the world's preeminent, most effective, and sought-after partner for innovation. It is among the most powerful engines of American prosperity, producing value far beyond the sum of its individual agencies. History confirms that a secure, prosperous, and competitive future is found in research across all fields of science and engineering.

Tell your personal story! Explain how your research contributes to addressing local issues of concern or to jobs and to the economy. Note that your work is supported by Agency XYZ.

Proposed cuts to R&D would devastate scientific research! President Trump's 2018 budget would irreparably harm America's science and technology enterprise through drastic cuts to discovery science programs and critical mission agencies. The proposed cuts threaten our nation's ability to advance cures for disease, maintain our technological leadership, ensure a more prosperous energy future, and train the next generation of scientists and innovators to address the complex challenges we face today and in the future.

Why it Matters! Talking points on the economy.

- A 2015 literature review has shown that government R&D tends to complement, not supplant, private R&D, and in fact can stimulate additional private R&D.
- A recent study published in our journal, *Science*, found that nearly 10% of the National Institutes of Health's research grants directly generate a patent and more than 30% generate research papers that are then cited by patents. The [results](#), published in the 31 March issue of *Science*, emphasize the critical service provided by research funded by the NIH.

Say Thank You! Thank you taking the time to meet with us. We ask that you continue sustainable, predictable funding for federal research and urge that you prioritize these investments and reject cuts to science as you finalize the FY 2018 funding bills.

STEP FOUR: Do your Homework!

This is an important step for **EVERYONE** on the team. Everyone should do research on their Member of Congress. Things to do:

- Visit their personal office websites at www.house.gov or at www.senate.gov. Read their biography and learn about their leadership role and its purpose in the structure of Congress. Maybe they went to the same university you went to or grew up in the same area you did. Having something in common can help you start connecting with them.
- Visit their respective leadership office websites at <http://www.house.gov/leadership/> or <http://www.senate.gov/senators/leadership.htm> to learn about their party's priorities.

Understand that while you are speaking to them as a constituent, as leaders for their chamber and party these individuals must balance local and district interests with national agendas and party priorities.

- Learn about the federal research and development (R&D) budget and understand where Congress is in the process of finalizing the FY 2018 budget.

Budget Process 101: https://www.youtube.com/watch?v=v67UoLRuH_c&feature=youtu.be

Status of R&D Budget: <https://www.aaas.org/page/fy-2018-rd-appropriations-dashboard>

Mid-Session Analysis: <https://www.aaas.org/news/science-funding-holds-congress-begins-recess-where-are-we-and-whats-left-do>

STEP FIVE: Send a Thank You letter

After the meeting, follow up with a thank-you e-mail that repeats the main message and expresses a willingness to provide information or assistance in the future. Meetings are a way to build a long-term relationship, and Thank You letters can serve as an opportunity to emphasize your willingness to work with staff over the long term — not just when you want something.

STEP Six: Prepare a Meeting Summary

Prepare a brief summary of your meeting: who participated; with whom you met; topics discussed; questions raised; what was answered and what was not; and any follow-up planned or completed. It is useful for Government Affairs representatives from scientific societies or your institutions to know your contacts, topics of discussion, and general tone of the meeting.