

# Face-to-Face with Congress:

Before, During, and After  
Meetings with Legislators



THE PARTNERSHIP FOR  
*A More Perfect Union*  
at the  
CONGRESSIONAL MANAGEMENT FOUNDATION

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## About This Report

The data in this report are based on CMF's vast knowledge and experience working with House and Senate staffers during its 37-year history and on four online surveys of congressional staff taken between 2010 and 2013. Staff in the House and Senate were invited to participate in the surveys via email, and almost 450 responses were received from Chiefs of Staff, Legislative Directors, Communications Directors, District Directors, Schedulers, Correspondence Directors, and other mail/legislative staff.

## Special Thanks

We are grateful to our sponsors, Blue Cross Blue Shield Association, Professional Women in Advocacy Conference, and RAP Index, who have generously enabled us to produce this report. Their contributions further the important work of CMF's *Partnership for a More Perfect Union* and help promote a more effective and meaningful democratic dialogue.



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# Introduction

According to congressional staffers, in-person visits from constituents are the most influential way to communicate with a Senator or Representative who is undecided on an issue. This was just one of the findings in the 2011 Congressional Management Foundation (CMF) report *Perceptions of Citizen Advocacy on Capitol Hill*. Most of the congressional staff surveyed said constituent visits to the Washington office (97%) and to the district/state office (94%) have “some” or “a lot” of influence on an undecided legislator, more than any other strategy for communicating with a Member of Congress.

Whether someone is a member of an association, an employee of a business, a supporter of a nonprofit or interest group, or just a constituent with something to say, Senators and Representatives want to hear from their constituents. In fact, Members of the House of Representatives consider keeping in touch with constituents to be the most important aspect of their job satisfaction. As described in the 2013 CMF-Society for Human Resources (SHRM) report *Life in Congress: The Member Perspective*, 95% of the Representatives surveyed rated “staying in touch with constituents” as the job aspect most critical to their effectiveness.

Though constituent contact is extremely important to legislators, interacting and building relationships with them can be a challenge, largely due to their hectic lives. The CMF-SHRM report also found that Representatives work an average of 70 hours per week when the House is in session and 59 hours per week when it is not in session. They have approximately 13 meetings per day on a wide array of issues, and they are bombarded from all sides with data and opinions, many of them unsolicited. They also must find time for family obligations, campaign duties, and political party functions. Though Senators and Representatives want to meet with constituents, because of these competing demands, getting on their calendars and influencing the policy decision-making process requires preparation and a little finesse on the part of advocates.

The purpose of this report is to provide research-based guidance for scheduling, conducting, and following up after office meetings with Members of Congress and staff. To develop this advice, CMF used information collected through its long history working with congressional offices and data from surveys conducted with congressional staffers, primarily from the House of Representatives, between 2010 and 2013. Included in the survey were open-ended questions that allowed staffers to report candidly and anonymously on aspects of constituent meetings that they would never reveal to constituents, convey to lobbyists, or whisper to reporters.

*Members of the House of Representatives consider keeping in touch with constituents to be the most important aspect of their job satisfaction.*

Building on its 37-year history of aiding and researching Congress, CMF hopes this information will provide valuable information to advocacy organizations, citizens, and Congress, as well as guidance for conducting effective meetings between constituents and lawmakers and help build better relationships between citizens and their legislators on Capitol Hill.

## Planning for a Meeting

The process for an effective meeting with a Senator or Representative begins with advanced planning. In addition to thinking about the goals for the meeting, attendees need to know a little bit about how Congress and congressional scheduling work before they step into a legislator's office.

### 1. Include constituents.

The United States is a representative democracy, which means that Senators and Representatives are beholden to the people they represent before anyone else in the country. One of the biggest pet peeves expressed by House Schedulers was a constituent “bait and switch,” when a constituent is promised but does not materialize when the meeting occurs. Groups’ reputations with Members have been ruined through this sort of duplicity. If a meeting is scheduled with a constituent, then someone who lives in the Senator’s state or Representative’s district should be in attendance.

*“Our number one factor in scheduling a meeting is if a constituent is in the group. Constituents from our district take top priority over any other type of request.”*

—House Scheduler

### 2. Know the congressional schedule.

Though the day-to-day schedule can be unpredictable, each chamber posts its annual calendar online at the beginning of each year, and usually sticks closely to it. When votes are scheduled in the House of Representatives or Senate, legislators will be working in Washington, D.C. When there are no votes, many can be found working back home among their constituents. Meetings back home can also sometimes be scheduled on weekends, since many Senators and Representatives work most weekends attending events, visiting businesses, and meeting with constituents.

### 3. Be flexible about time and location.

If the date and time for a meeting are rigid, it will be more difficult to schedule with a Senator or Representative. The more flexible attendees can be, the more likely it is that they will be accorded a meeting. “Constituent groups should allow the congressional office to determine the time they will meet with the Member instead of their dictating the best time frame for them,” said one House Chief of Staff. It also helps to be flexible about location. As Figure 1 shows, almost three-quarters

(71%) of the House Chiefs of Staff surveyed said their bosses had no preference as to where they meet with constituents.

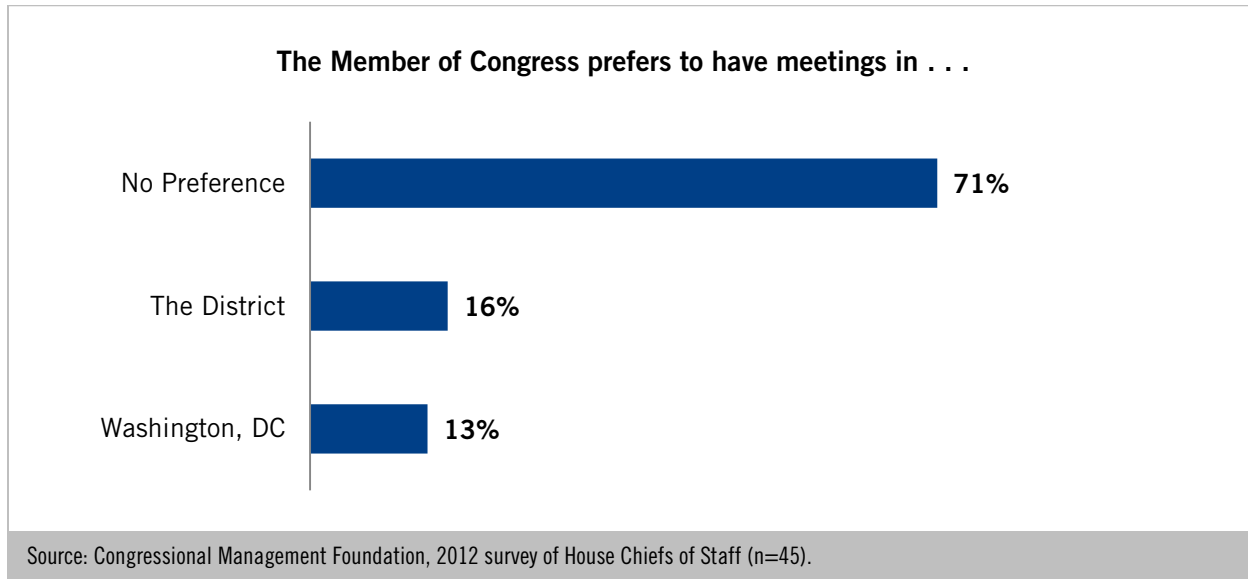
#### 4. Keep the group small.

While Senators usually have larger suites, space is severely limited in most Representatives' offices. In fact, many offices are so cramped that meetings may occur in informal settings like the reception area, cafeteria, hallway or even in an elevator as the legislator is on the way to vote. This is not a sign of disrespect. It is a reflection of the small offices and hectic work lives of Representatives and their staffs. A large group risks overflowing the small spaces and spending the entire meeting making introductions, rather than making its case.

*“Don’t bring too many people, four at most is best. Rooms are small and it is easier to appoint one or two people to speak.”*

—House Chief of Staff

**Figure 1. Meeting Location Preferences**



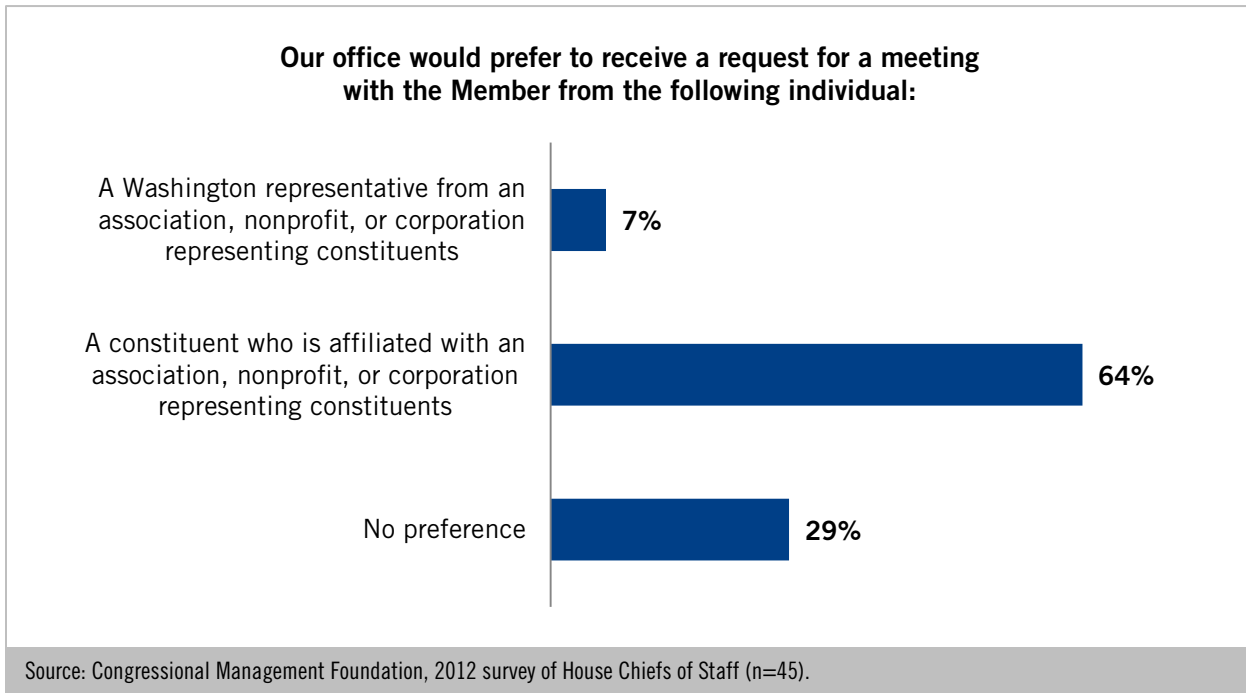
## Scheduling a Meeting

Once there is a sense of who will be attending the meeting and where and when it should be, it is time to contact the Senator's or Representative's Scheduler. Most Senate offices have separate Schedulers for Washington, D.C. and the state, and about half of House offices follow this model. The two Schedulers defer to each other based on where the legislator will be at the time of the meeting, so the request must be directed to the appropriate person. The rest of the House offices have a single Scheduler who manages all of the Representative's time. Keep the following in mind when contacting a congressional Scheduler.

## 1. Have a constituent make the request.

As Figure 2 shows, about two-thirds of the House Chiefs of Staff we surveyed said a request for a meeting with the legislator should come from a constituent. Only 7% said the request should come from a Washington representative of the group, like a lobbyist or coordinator, and the rest had no preference for the source of the request.

**Figure 2. Preferences for Source of Meeting Requests**

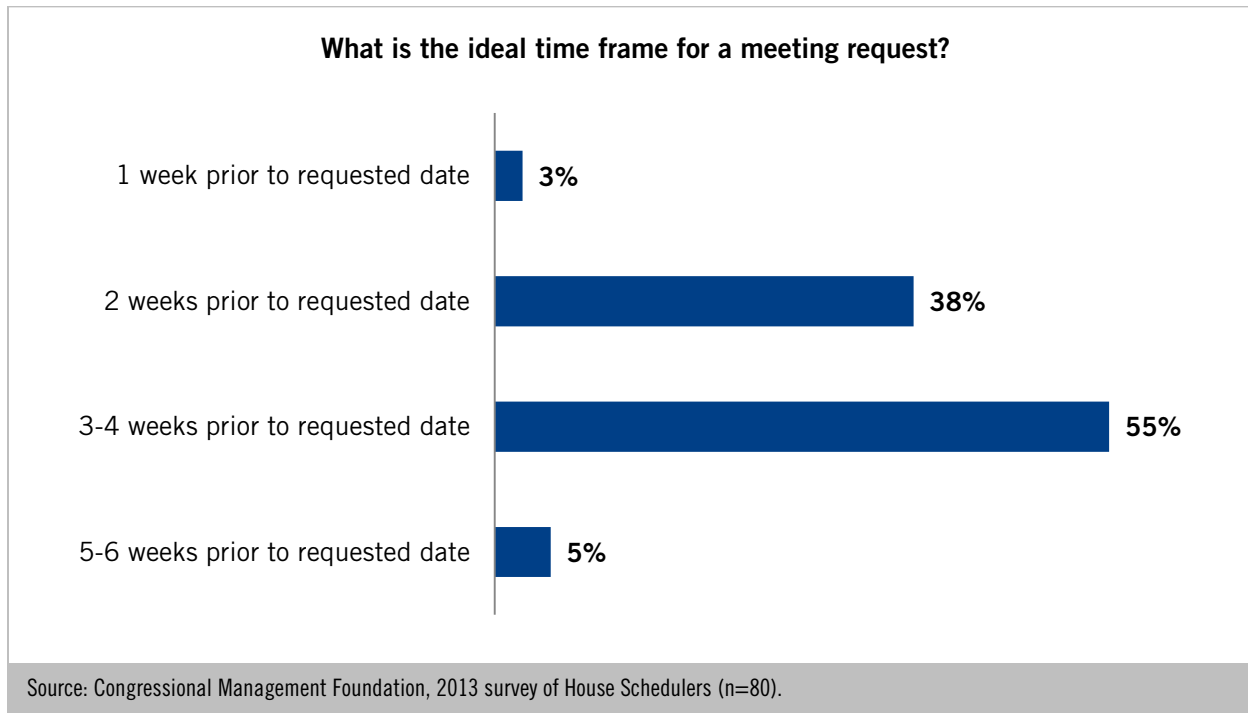


## 2. Make the request two to four weeks in advance.

Congressional offices are busy places, and Senators and Representatives have many competing demands for their time. Most offices will not commit to a meeting request made too far in advance because it may eventually need to be rescheduled—a result of the erratic congressional calendar. However, last-minute requests will run into an inflexible, full schedule and a frustrated Scheduler. As Figure 3 shows, more than half (55%) of House Schedulers surveyed prefer a request to come 3-4 weeks in advance, and more than one-third (38%) prefer at least two weeks' notice.

*“Last minute scheduling requests are my biggest pet peeve.”*

—House Scheduler

**Figure 3. Ideal Time Frame for Meeting Requests**

### 3. Include all the information the Scheduler needs.

There are a lot of logistics and decisions involved in deciding how a Member of Congress will spend his or her time. In the initial request be sure to provide all the information the Scheduler needs, since it will not be considered until everything is together. As one House Scheduler put it, “I can’t ask my boss if he wants to take this particular meeting until I have all the information. If I don’t get the information in time it won’t go to the Congressman and thus will be set with staff.” Most Schedulers we surveyed require at least the following:

- Meeting topic or reason for the meeting (96%);
- Primary contact’s name (95%);
- Name and short description of the group (92%);
- Requested meeting date (91%); and
- Primary contact’s email address (89%).

Many offices post their scheduling requirements on their websites and in Schedulers’ voicemail messages, so be sure to click or call before you request a meeting.



#### 4. Be prepared to meet with a staffer.

If the Senator or Representative is not available, the Scheduler will often set up a meeting with a staffer. Sometimes the meeting will be with a staffer, even if it was on the legislator's schedule, due to a last-minute schedule change. Meeting with a staffer does not mean the legislator does not care about the meeting or the issue. It simply means the he or she is not available, and the office wants to accommodate the group. Congressional aides are knowledgeable and have the trust of the legislator, so a meeting with them can be as effective as a meeting with the legislator. "A meeting with staff can be VERY beneficial and much more likely to happen. There is only one congressman with only so many minutes in his day. There are usually three to five legislative staffers with more availability than the Member," said one House Scheduler.

*"A meeting with staff can be VERY beneficial and much more likely to happen."*

—House Scheduler

## Conducting a Meeting

Meetings with Senators and Representatives in Washington, D.C. are usually brief (15 minutes or less), often interrupted, and they can be intimidating for a lot of people. As a result, it pays to be well-prepared before setting foot in the office. Meeting attendees will be most effective if they have: clear goals in mind for the meeting; *brief* talking points to convey; a clear sense of what they are asking the legislator to do; and a good idea of what to expect during the meeting. Following are some of the things to keep in mind when meeting with legislators.

#### 1. Be on time.

Individuals who are early for meetings with Senators and Representatives often have to wait until the legislator is available. In most Washington offices, this means crowding into the reception area and having to get out of the way as staffers dart to and fro. If people are late for a meeting, they risk not being able to meet at all. Try to arrive no more than five minutes before an appointment and let the Scheduler know if attendees are going to be even a few minutes late. He or she can help manage the Member's time during the wait or possibly provide another time later in the day if the Member cannot wait.

*"Please be in touch with the office if you will be late. Members are scheduled so tight that tardiness can impact the ability of the meeting to occur."*

—House Chief of Staff

#### 2. Be flexible.

When meetings are scheduled in Washington, there is no way for Senators, Representatives or their staffers to predict when committee and floor votes will occur. On any given day, legislators can be called to vote at any time. For this reason, it is important to be flexible. If the legislator is unavailable, the group will either be asked to wait or they will meet with a staffer. If they meet with a staffer, they should do and say exactly

what they had planned to with the legislator, and, if he or she walks in during the meeting, there is no need to start again. The legislator will ask questions, as needed, and will follow up with the staffer after the group leaves.

### 3. Stay on topic.

It can be tempting for attendees, when faced with what might be the only meeting they will ever have with their Senator or Representative, to raise issues other than the one they came for. However, they need to focus on the issue at hand. The limited time allotted should be used to accomplish the goals for the meeting by making a clear, focused, and persuasive case and asking the legislator to do the thing they feel is most important to advance the issue. Future meetings can be scheduled to discuss other issues.

### 4. Keep politics out of it.

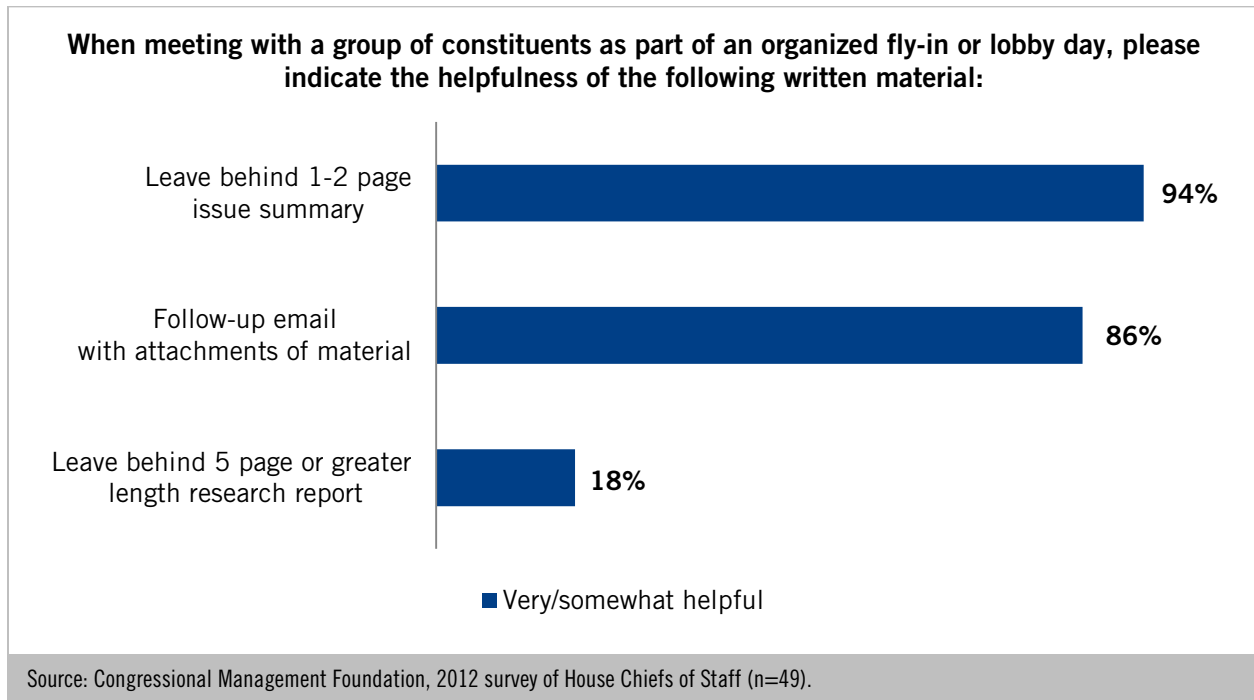
Attendees may disagree with the legislator on some or all of the issues that matter to them, but they need to set that aside if they want the meeting to be as successful as possible. It is important that attendees be respectful and leave general political feelings out of the meeting. Winning a Representative over depends on effective communication, engaging dialogue, and persuasive arguments. A meeting in a legislator's office is not the time or place to bring up elections or campaign contributions unless the meeting is about campaign finance reform.

### 5. Provide a brief summary document.

Persuasion does not have to stop when attendees leave the office if they leave a summary of their issue and stance behind, as long as it is brief. As Figure 4 shows, it is very helpful to leave a one to two-page summary of the issue and to send some information to a staffer via email after the meeting. These serve as reminders of the group and the issue, and they provide staff with something to refer to as the issue moves through the legislative process. If the meeting is coordinated through an organization (e.g., an association or employer), having clear, concise, Congress-focused information on the organization's website can also extend the usefulness of the meeting. Many people leave reports, marketing folders and longer issue briefs behind, but these are not likely to be read. Keep it simple and short, and it will be useful.

*“Mentioning campaign contributions or other political support should be avoided. It is against the rules and it intimates that they and the Member of Congress are for sale.”*

—House Chief of Staff

**Figure 4. What to Leave Behind**

## Following Up after a Meeting

Citizens who follow up and keep in touch after they meet with a Senator or Representative can become more trusted resources for the legislator and staff, which makes them more effective advocates for their issues. Some of the things to consider doing after the meeting are below.

### 1. Answer questions if the office asks them.

Sometimes a legislator or staffer will ask a question during the meeting that the attendees cannot answer or will follow up with a question after the meeting. These questions should be answered, even if the answers do not wholly support the attendees' case. It is better to be reliable and trustworthy than cagey or silent. "In the event that the Member or attending staffer requests technical or specific information it is extremely helpful to receive that information in a future contact. It is surprising how often a constituent, or even a paid lobbyist, will fail to respond to requests for technical information," said one House Chief of Staff.

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### 2. Follow up with the staffer.

Senators and Representatives almost always have a staffer attend meetings, usually the advisor on the issue being discussed. This person will usually hand out business cards with his or her title and contact

information. Attendees should use that information to send a follow-up email a few days after the meeting. The message should be brief, thanking the staffer for his or her time and reiterating the issue and the request. Including an electronic version of the leave-behind and a link to reliable online information about the issue will serve both as a reminder of the issue and a resource the staffer can easily locate when the issue comes up in the legislative process.

### 3. Attend events in the district.

If attendees show up, from time to time, at town hall meetings and other public events the legislator is hosting or attending, they start to build a relationship with the office. If meeting attendees are seen visibly engaged in advocacy and public policy in the district or state—especially in a constructive, non-confrontational way—legislators and their staff view those individuals as more trustworthy advocates for their issues. If attendees are in a position to plan an event or site visit for the Member, even better. The Member can see, first-hand, what the group is advocating for and, if other constituents are involved, both the issue and the Member receive broader attention.

*“[My Member] prefers to be out in the district meeting with constituents in their own venue. He gains insight to their issues, challenges and needs by being present on the ground.”*

—House District Director

### 4. Keep in touch.

It is unproductive to become what congressional staff call a “pen pal,” or someone who over-communicates with them, but it is a good idea to touch base every once in a while. If new information about the issue is released, attendees should contact the office to call their attention to it. If there is movement on key legislation in committee or a floor vote is expected, attendees can remind the legislator of their stance. If there is a new or creative way for the Member to fulfill the request made during the meeting, attendees should point it out. If communications are informative, respectful, concise and direct they can go a long way toward helping the Member and staffer keep the issue on their radar.

## Conclusion

From the founding of our country, in-person meetings with Senators and Representatives have been the most effective way for citizens to shape public policy. Even with the many and diverse communications venues now available, meetings still trump any other interaction between legislators and their constituents. Anyone who wishes to help shape public policy on the issues about which they care deeply should consider scheduling meetings with their Senators and Representatives, using this primer as a guide.

# About the Congressional Management Foundation

*Established 1977*

## Who We Are

Citizen trust in an effective and responsive Congress is essential to democracy. Since 1977, the Congressional Management Foundation (CMF) has advanced this goal by working directly with Members of Congress and staff to enhance their operations and interactions with constituents. CMF also works directly with citizen groups to educate them on how Congress works, giving constituents a stronger voice in policy outcomes. The aspirations are: a Congress more accountable, transparent, and effective; and an informed citizenry with greater trust in their democratic institutions.

## What We Accomplish

CMF enhances the effectiveness of congressional offices, enabling them to provide better services for their constituents and create better policy outcomes for all Americans.

CMF promotes transparency and accountability in Congress, affording citizens data and tools to become more informed about decisions that affect them, their families, and communities.

CMF educates and motivates individuals to become active and informed citizen-advocates, providing them with an understanding of Congress, the skills to influence public policy, and the value of citizen engagement.

CMF enhances the public's understanding of how the Congress really works, providing a window into our democratic institutions through its unique relationship with lawmakers and staff.

## How We Do It

CMF conducts professional development training and consultations for all levels of congressional staff to strengthen their office operations and management. CMF provides research, training, and publications to citizens and groups so they can better to enhance their interactions with Congress. CMF critiques and explains Congress—demystifying its operations. CMF conducts primary research on Congress and provides best practices guidance on office operations.

## Quick Facts

- More than 350 congressional offices participated in the 70 training programs CMF conducted in 2013.
- In 2013, CMF conducted 56 educational sessions with groups involving thousands of citizens on effective interactions with Congress.
- Since CMF has been assessing congressional websites and urging more transparent practices, the percentage of Members of Congress who post their voting record online has doubled.
- Since 2000, CMF has conducted more than 500 strategic planning or other consulting projects with Members of Congress and their staffs.

For more information, contact CMF at 202-546-0100 or visit [www.CongressFoundation.org](http://www.CongressFoundation.org).

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“We in America do *not* have government by the majority.  
We have government by the majority who participate.”

—Thomas Jefferson

***Become a Partner in Enriching the Relationship Between Citizens and Congress***

The *Partnership* is a subscription program within CMF that seeks to further our nation’s progress toward “a more perfect union” by fostering the genuine and effective exchange of ideas between Members of Congress and citizens.

We conduct communications best practices research and help forge relationships between congressional staff, advocates, and citizens through presentations, webinars and videos based on CMF research.

**Topics of Presentations**

- “Screaming Monkeys, Roaring Lions: Making Noise vs. Making a Difference on Capitol Hill”
- “Use Social Media to Build Relationships with Lawmakers”
- “Build an Event in the State Members of Congress Will Attend”
- “Turn a 10-Minute Meeting with a Legislator into a Life-Long Relationship”
- “Tell a Story to Win the Hearts, Minds, and Votes of Lawmakers”
- “Build Relationships with Freshmen Lawmakers”

*“Our members were buzzing about the CMF presentation! The facts, charts, and anecdotes not only engaged them but captured them. They left the session knowing that their work in member advocacy is more important than ever.”*

—Laura Vogel, Manager of Federal Member Advocacy, National Association of REALTORS®

CMF’s *Partnership for a More Perfect Union* is dedicated to enriching the relationship between citizens and Congress by comprehensively addressing communications challenges faced by both sides.

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