A Team Lead’s Guide for Congressional Visits

Tips for Scheduling Your Meetings

1) **DECIDE WHO YOU WANT TO VISIT.** Do you have time to visit every member of Congress from your state? Alternatively, do you want to visit with your two senators and your representatives? You can meet with as many lawmakers as you like. Please remember, concentrating FOTH meetings during these two weeks (April 5-7 and April 11-14) will help ensure that we provide a collective voice on the Hill during a concentrated period of time, while also taking into account the bandwidth of attendees.

2) **CONTACT THE CONGRESSIONAL OFFICES OF THE LAWMAKERS WITH WHOM YOU WANT TO MEET.** Make sure you contact your lawmakers’ Washington, D.C., office. You can find the phone number for your Member of Congress at congress.gov. The Forum can also provide up to date contact information, upon request.

   - When you get a hold of the office, ask to speak with the lawmaker’s scheduler.
   - Inform the scheduler that you are a (1) constituent, (2) that you are participating in a virtual hill day (FOTH) and you would like to meet with the lawmaker to discuss legislative issues affecting foundations and philanthropy. (If the scheduler is not available, please leave him or her a voice mail with this information.)
   - Request and expect around 15 minutes for the meeting. Capitol Hill meetings are very brief.
   - You may be asked to e-mail a letter stating (1) where you are from, (2) the date and time you would like to meet, (3) why you will be on the Hill, (4) what you would like to discuss with the lawmaker, and (5) your contact information. A sample meeting request letter is available on the Forum website.
   - The ideal scenario is a meeting with the lawmaker and the lawmaker’s tax aide or legislative director. If for some reason the lawmaker is unavailable, the tax aide or legislative director should be able to meet with you. They can be your best advocates! See the most commonly used titles and principal functions of key staff in your representative or senator’s office, also available on the Forum website.
3) **SAMPLE PHONE SCRIPT.**

- “Hello, I am [name] from [name of organization]. May I please speak to the scheduler?” (Write down the scheduler’s name. Be sure to get the correct spelling.)
- “Several of our members will participating in a virtual hill day for the philanthropic sector (FOTH), on [date], and we would like to schedule a meeting with Representative/Senator [Name] and/or his/her legislative director to discuss the importance of [insert subject here] and related legislative issues.
- “May we do this on the phone, or would you prefer an e-mail?”
- At this point, you may either continue, or take down the e-mail address.
- Although you should make every effort to get a meeting with the legislator, many times you will be referred to the appropriate staff person instead. If you are able to continue on the phone, let the scheduler know who is coming:
- “At this time, the following people will be attending: [list names and affiliations].
- We would like to schedule a meeting between the hours of [times].”

4) **BE PERSISTENT.** Members of Congress are extremely busy people and it may take several calls to finalize a meeting.

5) **AS YOU START TO SCHEDULE MEETINGS, ALLOW ENOUGH TIME BETWEEN EACH ONE.** Give yourself at least 15 minutes or 30 minutes in between virtual meetings.

6) **APPOINTMENT REPORT FORM.** The best way to keep track of appointments is with Excel, or something similar. Information to include in the report form:

- Name of legislator (including the state/district they represent)
- Name of scheduler
- Phone number of congressional office
- Name of staff person who may take the meeting
- Time requested/time confirmed
- Attendees (with contact information—e-mails/office #/cell #)
- Meeting location
- Date appointment is confirmed and who confirmed it

7) **RUNNING INTO PROBLEMS SCHEDULING YOUR MEETINGS?** Contact Matthew L. Evans, Senior Director of Public Policy at matthew@unitedphilforum.org.

**Tips for Preparing for Your Meetings**

1) **RESEARCH YOUR LEGISLATORS:** Conduct research on the legislators and staff you plan to meet with ahead of time. What personal, legislative, or press activity has the legislator engaged in regarding philanthropy? Any of these could potentially open the door to support. Know what issues they care
2) **PLAN BEFORE THE MEETING:** If you’re attending the meeting with a group, please make sure you meet beforehand to plan the meeting, identify issues or stories to share, and pick a spokesperson(s). If you will have a large group at a meeting, not everyone will have time to speak so it’s important to choose who will speak about what prior to the meeting.

3) **KNOW YOUR ISSUES:** Have a strong familiarity of the issues and focus on no more than three during the meeting. For additional issues, put it in writing. If you do not feel comfortable speaking on an issue, it is ok to say that you will get back to them after the meeting. Forum staff is also available to attend meetings.

4) **PREPARE A SEND AHEAD PACKET:** Include contact information, overview of region/state philanthropy, issue papers, news clippings, etc., but most importantly keep it brief! If you are not willing to read all of the materials, the member or staff will likely not be willing to read the materials.

5) **PROVIDE MATERIALS BEFORE MEETING:** Email your materials to the scheduler before your meeting.

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**Tips for What to Expect On the Day of the Meeting**

1) **MEETING ATTIRE:** Wear professional attire—something that would be appropriate for a job interview.

2) **BE PUNCTUAL:** Members of Congress have busy schedules. If you are late, your meeting will be shortened or cancelled.

3) **CALL AHEAD WITH CHANGES:** If you are going to be late or have to cancel the meeting, call the congressional office beforehand.

4) **BE FLEXIBLE:** The congressional schedule is very fluid and members of Congress and staffers are often pulled away for last-minute, unplanned activities and, as such, your meeting could be delayed or bumped. Do not take any last minute meeting changes personally and make sure you always are gracious and flexible.

5) **RELAX:** Don’t be nervous! Remember that your member of Congress should be more nervous than you are—you are electing him or her after all!

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**Tips for Conducting Your Meetings**

1) **FLOW OF THE MEETING:** During the meeting, provide brief introductions (1–2 minutes), then go right into key message points.

2) **PROVIDE A PERSONAL STORY OR REAL-LIFE ILLUSTRATION:** These are more memorable than statistics.

3) **BRIEFLY CITE STATISTICS:** Be sure to mention any local, regional, or state data to support your case.

4) **BE CONCISE AND HONEST:** Talk about specific issues and solutions, and make clear the relevance of the issues to their constituents.

5) **IT’S OK TO SAY “I DON’T KNOW”:** Your member of Congress or his/her staffer may ask you a question you do not know the answer to. Politely say “I don’t know” and promise to follow up. Don’t make something up!

6) **DON’T FORGET THE ASK:** This is the most important part of the meeting! Ask your member of
Congress to contact you if new legislation is introduced.

7) **BE A RESOURCE**: Offer to be a resource to your senator or representative.

8) **EXCHANGE CONTACT INFORMATION**: Don’t forget to get staff business cards!

9) **GET A SCREENSHOT**: They love pictures with their constituents and its gives a nice opportunity for you to follow-up and share the photo. Don’t forget to share it with the Forum as well.

10) **OFFER TO ADD MEMBERS OF CONGRESSS AND STAFF TO YOUR MAILING LIST**: If they wish, you can include them on mailings such as your annual report, newsletters, and other materials.

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**Tips for What to do after Your Meetings**

1) **FOLLOW UP**: Be sure to follow up with the legislator’s office.

2) **DON’T FORGET A THANK YOU LETTER**: Within a week of your meeting, send a thank you letter via email to your member of Congress and his or her staff. Include photos from your meeting!

3) **ENGAGE THE MEDIA**: Reach out on social media and to your local media to tell them about the meeting. Template opinion pieces and press releases will be available on the website in March. If you have screenshots with your representative and/or senator, include those too. Share them with the Forum as well!