

Congressional meeting guide

Setting up a meeting

1. Identify your members of Congress [using this tool](#) or a similar resource
2. Members of Congress have staff that help them make policy decisions. Call your senators' or representative's office to set up a meeting with staff. Explain the issue you would like to discuss, and the office scheduler can help connect you to the appropriate staff person. You can also use [tools like this](#) to search for congressional staff directly and email a request.
3. When asking for a meeting, be clear about your connection to the district and the issue you would like to discuss. It's often helpful if you also propose a specific time. You may not hear back right away, so be persistent! The following is an example email to request a meeting:

Dear (staffer name),

I am writing to request a meeting on behalf of five members of XYZ Mennonite Church in Lancaster, PA. We hope to meet with you virtually to discuss TOPIC and how Rep. LASTNAME can support this important issue. Would the afternoon of Thursday, June 25th work for you? I would be happy to follow up with a video call-in link if that works for you.

Best regards,

Before your meeting

1. If you will be meeting with the congressional office as a group, schedule a meeting in advance to prepare and assign roles. Note that one person can perform multiple roles.
 - a. **Group leader/ moderator:** This person welcomes the staffer or member of Congress and facilitates the meeting, ensuring that everyone speaks, and that the meeting doesn't go over time.
 - b. **Thank you:** This person thanks the office for something positive that the member of Congress has done.
 - c. **Ask:** This person clearly and respectfully states the ask, mentioning any relevant legislation and the action they would like the member of Congress to take.
 - d. **Story-teller:** This person shares their personal connection to the ask and why it is important to them.
 - e. **Note-taker:** This person takes good notes during the meeting, noting in particular any questions or opportunities for follow-up. This person may also commit to sending a thank you/ follow-up email after the meeting.
2. Research the position your member of Congress has taken on the issue, including past statements or votes. Identify specific actions to address or thank the office for. The member's website is a good place to start.
3. Identify your "leave-behind" document, which summarizes key background information and facts about your specific ask. Advocacy organizations can help you prepare or find appropriate leave-behind materials.
4. Role-play your meeting and practice making your asks.

Meeting roadmap

1. **Greet the staffer.** If you are meeting virtually, be sure to join the call promptly. When the staffer joins the call, thank them for taking the meeting and ask them if they have any time restraints.
2. **Introduce yourselves.** Begin with a brief round of introductions. Explain in a few sentences who you are, your connection to the community/district and why this issue is important to you. Remember that staffers are often from the state themselves and may recognize the communities you mention! Allow for some back-and-forth and invite them to introduce themselves as well.
3. **Say “thank you.”** Thank the office for taking the time to meet with you. When possible, also thank them for a position the legislator has taken which you support.
4. **Introduce the ask.** Concisely share background and relevant details for the issue, and the actions you would like the office to take in response. Be specific! Offer concrete recommendations like co-sponsoring or voting in favor of a bill, making a public statement or signing a letter. Remember that you don’t need to be a policy expert – your members of Congress work for you and care about your opinions.
5. **Tell your stories.** Explain why you care about this issue and what it means to you and your community. Telling your story, or a story from your community (even if it is one you heard about from a news story) is an important way to connect with the values and priorities your members of Congress care about, and it can help change their minds.
6. **Respond to follow-up questions and listen.** Ask for and listen to the legislator’s/staffer’s responses to your request. Try to get a clear statement of their stance.
7. **Repeat the ask.** After discussion, repeat the ask, give the legislator/staffer a “leave behind” with your asks and say you will follow up. If you are meeting virtually, promise to email them relevant leave-behinds or links.
8. **Thank** the legislator and/or staffer. You may ask if you can take a photo or screenshot with your group. These are great to share on social media!
9. **Follow up with the staffer.** Email the staffer within three days of the visit to thank them for their time and reiterate your asks. If you don’t hear back, you may follow up several weeks later to ask whether the office has made a decision about the particular ask.

General tips

- Be polite and respectful! This meeting is part of building a relationship with your member of Congress. Find common ground where you can.
- Only schedule meetings with your own members of Congress. Congressional offices want to hear from their constituents, and probably won’t meet with you if they don’t represent you.
- Keep your asks simple and specific – resist the desire to name every position you would like your member of Congress to take, and focus on one topic or issue per meeting.
- Don’t worry if you can’t answer a question – your job is not to be an expert on the legislation, but to be an expert on your own experience and the connection between the issue and your community. If you’re stumped, simply say you will look into the answer and follow up with an email after the meeting.

Virtual meeting tips

- Video calls are almost always more engaging than phone calls – offer to set up the video call and share the link with the staffer. If you are managing the call, join with your group 10-15 minutes early to ensure that the technology is working.
- Practice good video call etiquette – mute yourself when you are not speaking and be aware of your background. Dress professionally and minimize distractions.
- Be creative! Video calls allow you to share your screen. While you should avoid long-winded PowerPoint presentations, sharing personal photos relevant to the issue can be a good way to connect with staff.
- Some offices prefer to use phone conference lines, which they will provide. Make sure you join the call promptly. When you are on the phone, be sure to identify yourself before you speak, and speak slowly and clearly.

Note-taking template

Congressional office _____ Staffer's name _____ Date and time _____

Participants:

- Moderator _____
- Thank you _____
- Ask _____
- Storyteller _____
- Note-taker _____

Personal notes about staffer or representative:

- *i.e. grew up in Lancaster, visited U.S.-Mexico border last spring, says issue is personally important to her*

Representative's position on issue:

Questions and opportunities for follow-up: