

## **CONGRESSIONAL VISIT TIPS**

Meeting face to face with your Members of Congress and/or their staff members is one of the most effective advocacy tools at your disposal, and following two years of virtual visits, USAging is excited to celebrate a return to in-person visits this year. However, not all offices are scheduling in-person meetings, so APB attendees may experience a range of experiences on their congressional visits. In addition, restrictions remain in place throughout the Capitol. Most offices are requiring visitors to report the exact number of individuals attending the meeting and may even require names. Visitors will be escorted throughout their visit. In years past, APB attendees would disseminate extra USAging Hill packets (that include USAging Policy Priorities) to offices with which they were unable to secure meetings. Unfortunately, the strict rules in place this year make this type of distribution unlikely.

Whether you are meeting with Members or staff or dialing it in, here are a few quick tips to help you make every congressional visit, no matter the form, a success!

### **In-Person Hill Visits**

#### **Be Prompt**

- ✓ Try to be on time for all your meetings, even though they may keep you waiting. Schedules change quickly on Capitol Hill, but you want to be reliable and courteous. If your other meetings run long, call the next office to let them know you are running late.

#### **Be Patient**

- ✓ Be prepared to encounter changes at the very last minute. A visit with a Member may suddenly turn into a meeting with staff. Be gracious and go with the flow.
- ✓ Treat everyone you encounter as a potential ally. Congressional staff may be young and may not know a lot about your issues, but they are gatekeepers to your Member and could end up being your best point of contact. See your meeting as an opportunity to build relationships with your Member's office.

#### **Be Prepared**

- ✓ Have your talking points ready and know what you want to cover in the meeting. But also remember that you will need to be flexible—if you end up with less time than you planned for, give them the short version.
- ✓ In a group visit, be sure to plan in advance who will say what in the meeting.

- ✓ Leave behind materials that can be helpful to staff, like short fact sheets, stats on your PSA, etc. [Bring one USAging Policy Priorities packet plus your own agency information to each meeting.]

## **Be Persuasive**

- ✓ Be clear about what you are asking for (e.g., increased appropriations) and why it is needed. Everyone comes to lawmakers asking for more federal dollars so you need to make the best possible case.
- ✓ Know your audience. Consider these and other factors as you plan your remarks:
  - **BACKGROUND:** It's okay to ask a staffer how much they know about the Older Americans Act or the Aging Network at the beginning of the meeting. If they are new to the issues, be sure to explain what a AAA or Title VI program does and how it fits into the larger Aging Network.
  - **FEDERAL FOCUS:** While it is important to mention that Older Americans Act dollars leverage state and local funds and that your agency has a variety of funding streams, try to stay focused on federal funding and policy. Your audience of federal lawmakers and their staff want to know how *they* can help.
  - **LIMITED TIME:** Members and even their staff have tremendous workloads and are sometimes at the mercy of floor action or committee schedules. If you are given generous time, go ahead and use it, but be aware that most visits will be rather short so plan your remarks accordingly. A ten-minute visit can still be very effective!
  - **RESEARCH THE POLITICAL REALITIES:** The more you know about your Member and his/her district, philosophy, interests and allegiances, the better you can talk about your work in ways s/he can understand.
- ✓ Use numbers. Make the case for why you need additional resources with the hardest numbers possible. (How many individuals are on your waiting lists? Is that an increase over last year?)

## **Be Passionate**

- ✓ Use anecdotes to bring your programs and services to life. As you know, people respond positively to our mission and often have personal experiences with caregiving or aging in place. Build on this with real life examples of how your agency helps older adults remain in their homes and communities for as long as possible.
- ✓ Congressional staff are usually passionate about their work too, so use language that allows them to get excited about your mission and how they and their boss can help you.

## **Be a Professional Resource**

- ✓ Ask the Member or staff what you can do for them. If they ask questions you can't answer, promise you'll get back to them later. Offer to send them any additional

materials or data. **Invite them to visit your agency and let them know you welcome their calls if they have any questions about aging policy.** Your goal is to become their local aging expert so they turn to you as an advocate for what your community needs!

- ✓ Follow up after the visit. Send a thank you note/email and then suggest a next step that will take your current relationship with the Member's office to a higher level. For example, if the Member has never visited your agency or another site, extend an invite for the next or a future congressional recess (April 11-22 and May 30-June 3).
- ✓ Stay in touch. You now have, at the very least, the name of a staff member who is tasked with following aging issues. When USAging sends out an *Advocacy Alert* asking you to call or email Congress, cc: that staffer or call them directly with your concerns.

## Virtual Hill Visits 101

The big difference between in-person and virtual lobby visits is technology—or how your visit will take place. Some legislative offices are happy to join video conference calls (e.g., Zoom), some prefer to dial in to non-video conference calls and others will provide their own technology or call-in information.

### I. SCHEDULING

No matter the platform being used, the process of arranging a virtual Hill visit is nearly identical to setting up an in-person meeting.

***\*SENATE VISITS: Whenever possible, advocates in each state should work closely together to prepare for a virtual Hill visit with Senators. Decide who should be the point of contact for the meeting request and how best you can communicate with each other once a visit is scheduled.***

1. Find the [phone number](#) for your lawmaker and give them a call. State your name, affiliation and that you are a constituent requesting a meeting. Ask to whom the meeting request email should be sent, which is typically the scheduler.
2. Email your request.

#### ***Sample Email to Request a Virtual Lobby Visit***

*Dear [Name],*

*My name is [name] and I am a [agency/program] advocate and constituent of [MEMBER X]. I would like to request a virtual appointment with the [MEMBER] on [date and time] to discuss [issue(s)]. If the [SENATOR or REPRESENTATIVE] is unavailable, I would like to meet with the appropriate staff member who covers this*

*issue. I can provide a Zoom link or conference call line for this meeting; please let me know what technology your office prefers. I expect to be joined by [X] colleagues and will provide a full list of attendees in advance. Please feel free to contact me at [phone number and email] should you have any questions.*

*Thank you,  
[Name]  
[Title and Agency/Program]  
[Email Address]  
[Phone Number]*

3. Confirm the date/time of meeting and include a list of attendees (include name, title, agency/affiliation, city) in the virtual invitation.

## **II. MEETING**

Virtual meetings are similar to in-person visits! If you have a large group, designate just a few people to speak following introductions. **Do not be discouraged if you are meeting with staff and not the lawmaker.** Staff are the Members' most-trusted advisors on the issues you care about. Barring a personal relationship with your Member, staff are the bridge to your success as an advocate and instrumental in developing and maintaining a strong relationship with your elected official.

- ✓ Research your legislator's history on issues or relevant bills.
- ✓ Practice what you will say and assign roles if in a group.
- ✓ Plan to discuss three or fewer "asks."
- ✓ Start the meeting with introductions including name and organization for each attendee.
- ✓ Thank the lawmaker for something (a vote or action in the community).
- ✓ After introduction, talk about the issue you came to address and make "the ask." Make sure to share **personal examples** in your/their community coupled with hard data when possible.
- ✓ Listen to lawmakers and note any follow-up questions or materials they may need. **Remember, you don't need to have all the answers! If you don't know an answer to a question, tell them you will get back to them.**
- ✓ **DON'T** argue; talk about politics or candidates; make-up a response to a question; be led off topic; or be intimidated.
- ✓ **DO** Enjoy the conversation. You are building a relationship and developing an opportunity to be a valued community resource to your elected official and his/her office.

- ✓ Thank the lawmaker and their staff for taking the time to have a meeting with you and note that you will follow up with any materials discussed during the meeting.

### **III. FOLLOW-UP**

Within a few days of the visit, send a thank-you email to all staff with whom you met. Remember to include any information they may have requested or you promised. If you visited with a group, make sure you debrief and identify the individual that will send a collective thank-you on behalf of the group.

**STAY IN TOUCH WITH THE STAFF YOU MET!** Reach out at least once a quarter with interesting news or other information the Member and his/her office might appreciate learning about in their community.

**GOOD LUCK!**