Advocate Workbook for a Stress-free Advocacy Day

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What to Know Before You Go!

Preparing for your Capitol Hill Meetings

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Knowing What You Want: Making the Ask

Asking for something specific is sometimes the only way to get a Congressional office's attention. Your goal is to force someone in the office to think about you and your issues for longer than 5 minutes—and making the "ask" helps you achieve that goal. There are essentially two kinds of asks: policy and relationship-building.

Policy Asks

Policy asks are oriented around specific legislative or government initiatives (e.g., asking a member to support a bill, vote a certain way, or contact other legislators).

What Can Elected Officials Do?	What Can't Elected Officials Do?
• Introduce, vote for or vote against legislation • Cosponsor legislation introduced by someone else • Send a letter to an agency about a concern you have • Send a letter to another member of Congress in an influential position, such as a member of the Appropriations Committee • Send a letter in support of a grant application • Help you find research information from federal agencies • Submit a statement to the Congressional Record	• Take a specific action in favor of you and your business • Support legislation that is not in their jurisdiction. House members cannot support Senate legislation and vice-versa. Likewise, federal representatives cannot support state-level legislation • Demand that a federal agency award you a particular grant

Relationship Building Asks

Sometimes you may be in a situation where it's inappropriate to make policy-related asks. Say, for example, you've had a meeting in Washington, DC and the elected official has indicated they'll think about what you've asked, but they won't be able to make a decision right away. While you want to be sure they know of your continued interest in the issue, you might want to consider making some "relationship building asks." Asking them to come see something in the district or submit a statement to your website is a far more effective way to get them to continuing thinking about the issue than simply sending them information. Examples include:

- Visit something in the community that relates to your ask
- Follow you or your organization on social media
- Write an article for your newsletter
- Submit a statement for your web site or participate in an online discussion
- Make a speech on the House or Senate floor about your issues
- Submit a statement to the Congressional Record
- Attend a meeting or employee luncheon
- Hold a town hall or community meeting on your issue
- Meet with you and other supporters in the district office

Knowing Who You're Talking To (And Why You're Relevant)

Before you meet with your federal, state and local elected officials, you should take a little time to learn about their interests so that you can frame your message in a way that's bound to get their full attention. Here are four things you need to know before your meeting:

Four Things to Know

1. **Whose District or State Am I In?**

   One of the most common questions asked in congressional offices is "Are they from the district?" Representatives and senators represent distinct groups of people and devote their energy to the requests and needs of those individuals. Members of the House represent all the people (usually around 750,000) who reside in a separate and distinct geographic area called a congressional district. Senators represent an entire state. Hence, every American in the 50 has one representative and two senators who are responsible for representing their views in Congress.

   In general, you should stick to contacting your own representative and senators, unless you can demonstrate that you represent the concerns of people who live in another district, for example by working in that district, being involved with projects in that district, or representing the concerns of others in that district. If you contact other members of Congress, don't be surprised if your phone calls, e-mails and/or requests for meetings are referred to the representative or senator who serves the area or state where you live.

2. **What does the legislator care about?**

   Most members have a legislative record reflected through: 1) votes; 2) formal support for legislation that has been introduced by other members (called

cosponsoring a bill); 3) legislation they have introduced themselves; and 4) position statements. You can learn a great deal about their policy interests by visiting their websites. Almost every legislator expresses their views and interests on an "issues" page. You can also review their press releases and social media sites.

3. **What Committee or Committees is my legislator on?**

   Members are assigned to committees based on their interests, their districts (or states, in the case of the Senate), and for the more competitive major committees, on how long they have served (seniority). Members usually serve on one to three committees. A member's ability to influence legislation depends largely upon whether she or he is a member of the committee of jurisdiction. Also, knowing committee assignments can give you insights into the issues that interest your member of Congress.

4. **Where are they on the political spectrum?**

   Members help all constituents, not just members of their political party (as some people believe). After all, your representative has been elected to represent you and your interests, regardless of your party affiliation or political viewpoint. But it's important to know where they stand, as that will help you structure your arguments.

How do I Find This Out?

The fastest way to gather this information is to hop on the Internet. Use www.congress.gov to see if your member has cosponsored any legislation related to your issues. This site has a searchable database with information on all the bills introduced in a particular session. Note: The bills are designated either House of Representatives (H.R.) or Senate (S.) by where in Congress the bill originated. Find out the interests of a particular Member of Congress by visiting his or her individual website, accessible via www.house.gov or www.senate.gov.

Another great resource for learning about all of your elected officials (from local and state to federal) is Project Vote Smart accessible at www.votesmart.org. Project Vote Smart is a bi-partisan effort to educate Americans about the men and women who govern our nation.

General Message Delivery Tips

Telling a Personal Story

The most important thing to remember in developing and delivering a message for your elected official is that you have something of value to contribute. In fact, you're one of the most important people the member of Congress or his staff person will see that day! Why? Because you're a constituent and/or you represent the concerns of constituents.

Your job in your meeting is not to spew forth as many facts and figures as you can about your issue. Rather, your job is to ***make it real*** for the elected official or staff person. You can achieve that goal by telling a personal story.

Think about it: there's some reason why you've decided to be an advocate on your issues. It likely impacts you directly in some deeply personal way. That's the message you need to relay to your elected officials. They will get all the facts, figures and statistics from your talking papers, as well as the national organization (where applicable). What you bring to the table is a compelling story about the impact of policy issues on people that the member of Congress represents.

Worksheet: Developing the Story

Here are some questions / ideas to help you develop your personal story:

- Why did you become an advocate?
- How do the issues you are discussing impact you directly?
- Do they cost you money?
- Do they impact your health or the health of loved ones?
- Do they conflict with your organization's core mission?
- Do they impact your ability to do your job?

Do you have clients / customers / friends / colleagues that offer a compelling story? Have they:

- Benefited from your services?
- Contributed to your cause?
- Joined your campaign because of their own strong views?

How do these people and others connect to the Congressperson's district?

How can members of Congress help address your concern?

Take a few minutes to weave these questions into a story / anecdote.

Delivering the Story

Here's a good way to approach the meeting:

- State who you are and make the district connection: For example, my name is XX and I'm from the XX organization in the Congressperson's district.

- Explain why you're there: We are hoping that the Congressperson will support H.R. 1234, which would do X, Y and Z.

- Explain why it's important to you (hint: this is where your personal story comes in): H.R. 1234 is important to me because it -- saves me money, makes me healthier, protects the environment – whatever the case may be.

- As necessary / appropriate, refer to the leave behind materials (but please don't read them to the staff people).

- Ask if the Congressperson has taken a position on the issue (note that in many cases the answer will be "no."). If not, ask them to do so (remember, it's essential to put your ask in the form of a question).

- Let them know that you're available to be a resource and that you'll follow-up to see if they have questions and/or if the Congressperson can support your position. Be sure to ask the best way to follow-up (phone / e-mail / meeting) and collect all contact information.

All About Your Meetings

Getting to Capitol Hill

Transportation: Your organization may have arranged transportation to the Hill for your group. If not, or if you prefer to go on your own, know that the House-side offices are best reached by the Capitol South Metro Stop (on the blue and orange line), and the Senate-side offices are best reached by the Union Station Metro Stop (red line). You can also take a cab or other car service and simply tell the driver the name of the office building you're going to (i.e., please take me to the Longworth House Office Building).

Security: If you've been through an airport metal detector you'll have no problem getting through the security measures on Capitol Hill. They have a very similar system, although the lines are generally shorter and you do not have to take your shoes off. Be sure to leave the guns, knives and incendiary devices at home!

The Capitol Hill Layout

Overview: The Senate office buildings are Russell, Dirksen, and Hart, which are on the Senate side of the Capitol (the north side or to the left as you face the Capitol from the reflecting pool). The House office buildings are Cannon, Longworth, and Rayburn which are on the House side of the Capitol (the south side, or to the right as you face the Capitol from the reflecting pool). They are in the order noted above on each side. For example, Longworth is between Cannon and Rayburn and Dirksen is between Hart and Russell.

Getting Between Buildings: All of the office buildings are connected via underground tunnels. However, due to security reasons you cannot walk between the House and Senate underground without a staff person. You can go between buildings on one side or the other (i.e., between House buildings and between Senate buildings).

It takes about 20 minutes to walk from any of the Senate office buildings to any of the House office buildings. Note that it can also take 10 to 15 minutes to walk from Cannon to Rayburn (the two furthest House buildings) or from Hart to Russell (the two furthest Senate buildings) so give yourself time to get from meeting to meeting.

When in doubt, ask any of the Capitol Hill security guards for assistance. They are friendly people who are used to helping visitors.

What to Expect in the Meeting

When you walk into the office, don't be surprised if it feels a little bit like a war zone. The telephones ring constantly, there are usually at least five TVs blaring coverage of the day's floor debate, and staff are running from one meeting to another. This is why it's so important for you to have thought about your message beforehand.

The person at the front desk (usually a staff assistant) will greet you. Let them know that you are there for a meeting and who the meeting is with (sometimes, your meeting will be with a staff person as opposed to a member). Then they will ask you to either have a seat in the usually VERY SMALL lobby or, if there's no space, ask you to wait outside. Don't be offended – there's just no room. The staff assistant will let the person you're meeting with know you're there and that person will come out to start the meeting.

About Congressional Staff

Because you will likely be meeting with staff, following is a brief run down of the types of folks you might run in to.

Staff Assistant: Most House offices have one **staff assistant**. Most Senate offices have at least two. They handle the front desk duties, which include answering phones, greeting visitors, sorting mail, and coordinating tours. In many offices, these individuals will handle a few policy issues as well.

DC Scheduler/Executive Assistant: This is the person who schedules the Congressperson's time. In many offices, they may also handle an issue or two.

Legislative Assistant (LA): Legislative assistants handle the bulk of the policy work in a congressional office. A House office usually will have two to four LAs and a Senate office will have from three to as many as 12 (depending upon the state's population).

Legislative Director (LD): In some cases, the person who handles your issue may also be the **legislative director** who, in addition to handling policy issues, also oversees the legislative staff. There is usually just one legislative director in each congressional office.

Legislative Correspondent (LC): You also may be referred to a **legislative correspondent** who, in addition to drafting letters in response to constituents' comments and questions, also generally handles a few legislative issues. Most House offices have one or two LC's. Senators have three to five, depending on their state's population.

Press Secretary/Spokesperson/Communications Director: This individual is responsible for fielding all calls from the media and is often the spokesperson for the office. House offices usually have one designated press person. Senate offices have two to five.

Chief of Staff (CoS)/Administrative Assistant (AA): The **Chief of Staff or AA** oversees the entire operation. The chief of staff may sometimes handle a few policy issues, but generally he or she focuses on managing the office.

Tips on Working with Congressional Staff

Remember, Your Issue Is One of Many: Congressional staff handle a bewildering array of issues. They simply cannot know about everything related to any of their issue areas. This is especially true for issues that are not directly related to the member's committee or legislative agenda. The purpose of any meeting with congressional staff and/or the member should be to share with them your views on issues you care about.

If they aren't familiar with the issue, take that as a perfect opportunity to bring them up to speed!

Staff Contact Has Advantages Over Member Contact: Expunge the phrase "my meeting was ***just*** with staff" from your vocabulary. In many ways, working with congressional staff, rather than directly with the member, is to your advantage. Staff can take a little more time to delve into a particular issue and gain a greater understanding of why what you're proposing is such a great idea. With a little work on your part, they can become advocates for your cause within the congressional office. A great deal of what actually gets done is done through the initiative and sweat of the staff.

Expect (and Appreciate) Youth: Most congressional staffers are young, 25 or younger. The person you're meeting with may not look as if he or she is old enough to vote! Don't let that throw you. In most cases, staffers are bright and capable individuals who can be trusted to respond appropriately to your requests and deliver your message to your representative or senator.

General Tips on Getting Around

Wear Comfortable Shoes! Part of the reason why Capitol Hill is so intimidating is that almost everything is made of marble – including the floors. They are hard to walk on for even a few minutes, let alone several hours. This is not the time for your six-inch heels or, if you must wear them, put a pair of comfortable flats in your bag to change in to.

Be on Time: Staff and members often schedule their meetings in 20-minute increments back-to-back. If you're 15 minutes late, you'll only get five minutes. If you're 20 minutes late, you've lost the opportunity and will need to try to reschedule. If you're part of group, and one of your meetings is running late, split up. It's better to have part of the group show up on time for the next appointment than to have everyone show up 20 minutes late.

Don't Arrive Too Early: Sound odd? Yes. But House and Senate offices typically do not have large waiting areas. If you arrive well ahead of your planned meeting (say 20 to 30 minutes) you may have to wait standing up, squished against a wall, or out in the hallway. It's best to arrive about five minutes before the scheduled meeting time.

Be Flexible: A number of things may happen that might seem unusual, like being asked to meet standing up in the hallway. The member may be called away to vote during your meeting. You may have a meeting scheduled with the member, but due to last minute changes in the schedule, you may find you're meeting with a staff person.

> *Hall Meetings:* Don't be insulted if the staff suggests a hall meeting. It simply means that either the office is too small for the number of people in your group or another group is already using the one available meeting space.
>
> *Voting:* You may find that the member has to leave in the middle of your meeting to go vote. This means that the member has only about 15 minutes to get to the House or Senate floor and record his or her vote. No proxies are allowed, and if the vote closes before the member makes it to the floor he or she is marked as "not voting." Although this is difficult to avoid, since votes can occur at any time, they are generally less likely to occur before 11:00 A.M.

If You Can't Attend, Coordinate with Your Group About Calling to Cancel: It's surprising how many people feel that they don't need to call to cancel meetings they have set up with congressional offices. If you aren't able to make a particular meeting, and you're the only one assigned to go, it's common courtesy to cancel. If there are other people scheduled to go, check with them to make sure that someone will be attending.

The Five-Minute Rule: Although the meetings will generally run 15 to 20 minutes, you must prepare to deliver you message powerfully and effectively in no more than **five minutes**. With the possible interference of votes, schedules running late and last-minute emergencies that may be all the time you'll have.

Following Up: Creating Your Yearly Advocacy Strategy

Showing up in Washington, DC just once a year to make your ask isn't the most effective way to make a difference. You'll need to build long-term relationships with legislators to be not only heard, but (hopefully) agreed with. Consider this year-round advocacy strategy.

December / January: Legislator Research

Use what is traditionally "downtime" to learn more about the legislators you'll be approaching. Following the tips in the "know who you're talking to" section of this workbook will put you ahead of most players in the D.C. advocacy game.

February: Follow the Money

At most levels of government, February marks the start (or continuation) of the budget process. Congress and the Administration are starting to pull their proposals together. If you want to know more about how it all works, check out www.nationalpriorities.org for citizen friendly information on the federal budget.

March: Honing Your Message with the Message Formula

It's early spring which means it's that time of year again – time to connect with legislators and their staff in D.C. As you prepare to meet with legislators, think about your message. You can build a message that will resonate by using the message formula below:

- Hello, my name is [] and I'm from [] (establishes relevancy)
- I am here to talk to you about [policy / relationship ask]
- Knowing of your interest in [what policy issues is the person you're talking to interested in?] we think you'll be interested as well
- This is important to the people I represent because [personal story]
- That's why we really hope you'll [ask]
- I'd like to follow-up by [follow-up ideas]
- Can I get contact information for all the appropriate people in your office?

Mid-April / May: Memorial Day Town Halls

Legislators will be home setting up town hall meetings during the Memorial Day work period. Now's a great time to find out when these meetings will take place and make plans to attend. Who knows? If you stop by a little before or after the event you may be able to talk to the policymaker directly. The best way to find this out is to follow the legislator on his or her social media sites or even through the old-fashioned way—calling.

June / July: Planning Site Visits & Local Meetings

Start setting up site visits and local meetings for the August district work period, which starts at the beginning of August and last about a month. Showing a legislator or staff person something "on the ground," even if you're just attending a meeting in their district office, helps them understand how what you're asking for connects to the real live people they represent. It's always better to show people things, not just tell them.

September: Election Connections (During Election Years)

Elections are just around the corner, and now's the time to start connecting with candidates. It's important to identify those individuals who may bring an understanding of your issues to the policy process.

October: Build Coalitions

Coalitions can make or break your cause. Can you connect with support groups, underserved populations, patient groups or others to add impact to your message? When considering coalitions, ask yourself: who might serve as good coalition partners, either because they support our cause OR because they have good relationships with our target audience? Who should approach them?

November: Build Relationships with Staff

In many cases, getting to know staff people can move your issue forward even faster than getting to know the policymaker. No one believes it but it's true. Many D.C. policy staff make their way to the district or state during November and December. Now's the time to ask how you can connect with them at home!

Year-round: Social Media Outreach

Social media is here to stay and can be an incredibly useful tool for effective advocacy. "Like" your legislators on Facebook (you don't have to actually "like" them). Find mutual connections on Linked-In. Follow them on Twitter. All these steps will give you new insights into their interests and actions.

With all these tips and tools at your fingertips, you're ready to "Go Forth and Advocate!"