Conducting Successful Congressional Meetings

Meeting with your Member of Congress (Member) is one of the most common and effective forms of advocacy. As a voting constituent, your elected representatives are eager to meet with you and hear what you have to say.

This section of the toolkit will provide you with the tools and strategies necessary to set up a meeting with your congressional offices. It will provide you with step-by-step directions and sample and example materials to help you make the most of a congressional meeting.

Meetings with your Members in their district offices are great during congressional recesses and an excellent way to build a relationship with your Members in a slightly less formal setting. Both DC and local meetings provide a great platform to educate and build awareness. For simplicity, this section of the toolkit will refer primarily to meetings taking place in Washington, DC, but the same strategies apply to local meetings.

You should take time to plan out all of the steps in arranging a meeting and make sure you know what you want to achieve in the meeting.

Scheduling Your Meeting

This first step to getting a congressional meeting is to send a request to the office’s scheduler. The scheduler is often wholly responsible for the Member’s schedule, and all meeting requests for him/her go through the scheduler.

Many offices require a written request submitted in either fax or email form. To be thorough, it is best to submit via both fax and email. Due to security measures, direct mail takes a very long time to reach Capitol Hill in Washington, DC, making electronic communications the most effective method of scheduling.

TIP

Many offices require a written request submitted in either fax or email form. To be thorough, it is best to submit via both fax and email. Due to security measures, direct mail takes a very long time to reach Capitol Hill in Washington, DC, making electronic communications the most effective method of scheduling.

TIP

51

See Meeting Exhibit 1: Sample Work Plan (page 57)
Find out who on the staff handles housing/veterans/youth or other relevant issues (depending on the goals of your meeting) by calling the office’s main number and requesting that information from the front desk. Copy this person on the meeting request.

The meeting request should include basic information about the issue you hope to discuss with the Member and the approximate number of people who will be attending. It is important to tell the scheduler if you have a big group (more than about five people), so that he/she can find an appropriate space for the meeting.

If you do not hear back from the scheduler within a week or two of sending your request, do not hesitate to follow up. Schedulers juggle a lot of requests and last-minute changes, so politely persistent calls or emails can go a long way. Members’ schedules often are not finalized until a few weeks, or even a few days, in advance.

Congressional offices may offer to have you meet with a staff person in place of your elected official. It may require a big “push” to get an in-person meeting. Getting others to send letters of support is a great strategy.

Do not be discouraged if you cannot secure a meeting with your elected representative. Meetings with staff can be very effective, too, and the Member may have a last-minute scheduling change or may stop by for a “meet and greet” with you. However, if you are able to secure an in-person meeting, it is usually worth the extra effort.

Deciding Who Else to Invite

It is important to consider the tone you would like to set for your meeting when considering who else to invite. Bringing a consumer will set a more personal tone for the meeting, and the focus will tend toward personal stories and impact; having people the Member knows from the district will make the conversation more casual and focused on things happening in the district. Those you invite also may have their own agendas, so consider your own policy priorities and who in your community may have the same “ask” when considering whom to invite.
Remember that the more constituents and wider diversity of stakeholders you have in your group and the more pressing your issue, the more likely you are to get time with the Member. However, try to avoid large groups (more than 10) to ensure that the meeting stays focused and that each participant is able to connect with the Member or staff person.

Preparing for Your Meeting

In order to make your meeting as impactful as possible, you should research your elected official and have as much knowledge of the issues and their local impact as possible. The Alliance can help with this preparation.

Prior to the meeting, take time to determine one to two policy priorities. Discussing a long list of policy issues lessens the impact of each, decreasing the chance that your Member will take action on ANY issue. Policy priorities should be related to current legislation or the appropriations process. Find out which committees your Member sits on and if he/she has any other leadership roles in these committees or in his/her respective chamber. Before you decide on your priorities for the meeting, research what legislation is under consideration and what is happening in the committees on which your Member sits. The Alliance can help with all of this research.

Make sure you are aware of your Member’s legislative history. For example, has he/she been generally supportive of your issues? Is he/she fiscally conservative? Is he/she a veteran? These factors will help shape your discussion and your ask.

Be prepared to thank your Member. This can be for joining a sign-on letter, voting a particular way on an important issue, providing support in funding certain programs, or attending a recent local event. Thanking your Member shows that you have done your research, are knowledgeable about his/her legislative agenda, and are likely to be appreciative of future efforts.

It is helpful to have short policy briefs to leave behind. They should be as succinct as possible and highlight key points of the policy, its local impact, and what you want your Member to do.

Keep it local! Elected officials are concerned primarily with issues relating to their district. Prepare local anecdotes and facts and figures, and have local materials to leave behind with the Member or staff person. If possible, these materials should be tailored to the specific Member’s interests as much as possible. While Members care about the national impact of federal policy, they are most interested in its local impact.

See Meeting Exhibit 4: Example Leave Behind (page 60)

See Meeting Exhibit 5: Example Local Materials (page 62)
If there are more than two people in your group, decide who will chair the meeting and lead the overall discussion. If you are going with a large group, make sure to assign a discussion leader for each topic to ensure a streamlined conversation in which as many people as possible participate. Discuss in advance what the group will talk about and who will say what. It is important that during the meeting everyone is on the same message and participants are not disagreeing with each other or contradicting statistics or other important pieces of information.

Conducting the Meeting

In-person meetings can be an intimidating experience, especially for first-timers. Just remember, Members of Congress are there because of you! It is their job to listen to constituents. Also remember that you are the expert on homelessness. Congressional offices are responsible for a wide array of issues, and homelessness is just one small piece.

Make sure you are early for your meeting. It is always better to have to wait for the Member and/or staff person than to have them wait for you. They may be late, but be patient and grateful nonetheless. If you are not scheduled to meet with the Member, but still run into him/her in the office, be prepared with an “elevator speech” to quickly convey your message. An elevator speech is a quick speech that conveys all of your main points and requests. It is very short—like an elevator ride.
As discussed earlier in this section, keep the conversation local. Emphasize how specific legislation would assist or impact your community directly. Keeping the focus on local issues will make a bigger impact on your Member and help to contextualize your issue and place less pressure on you to be familiar with the intricate legislative issues and updates.

Be prepared for questions. If your Member asks a question and you do not know the answer, do not be afraid to say, “I don’t know, but I will find out.” Avoid guessing or making anything up. This is extremely important for building relationships and will provide a great platform for following up when you send an email later to provide a better informed answer. Often during these meetings, you will find that you are the expert on these issues and that the congressional office is looking to you for answers. Do not forget to make the specific policy ask during the meeting. The Member and/or staff are expecting you to ask them to take a specific action. Do not feel uncomfortable making this ask, even if the conversation seems casual.

After you make your specific ask, you might hear...

- **Yes** – Say: “Wonderful!”
- **Maybe** – Ask: “Is there any additional information I can provide to help you decide?”
- **No** – Ask: “Is there a reason why you will not do this? Is there any information I can provide that might address some of your concerns?” (This is an excellent opportunity to keep the lines of communication open.)

Before the meeting ends, exchange business cards, and make sure you know whom you can follow up with and when. Summarize any commitments made by the congressional office and any questions that you need to answer in follow-up communications. If appropriate to your organization and the topics discussed, take this opportunity to issue an informal invitation for your Member to visit a local homelessness assistance program (see “Achieving Effective Site Visits” for more information).
Meeting Follow-Up

The first thing you need to do following a meeting is to send a thank you note within a few days after your visit. Once again, summarize commitments made by the congressional office or yourself, and answer any questions that they may have had.

The most important thing following a congressional meeting is to keep the relationship going. Remember to take note of what topics the people you met with were particularly interested in, and use these as a guide for providing further information. The Alliance can assist you in assessing how and when to provide further materials to your office contacts.

Remember These Five Steps for Success

- Find out your Member’s position, committees, and legislative history.
- Create a meeting agenda in advance.
- Be flexible and prepared for changes at the last minute.
- Talk about what is happening locally and the local impact of the policy issue.
- Promptly send a thank you note to those with whom you met summarizing commitments made by both you and the office.
Meeting Exhibit 1: Sample Work Plan

To help plan your meeting, consider making a work plan like the one below. You can even print this work plan out and use it to guide your planning and implementation process.

Policy Issue:
(I.E., MCKINNEY-VENTO FUNDING, RUNAWAY AND HOMELESS YOUTH ACT FUNDING, VETERANS HOMELESSNESS PROGRAMS)

Specific Ask:
(I.E., HAVE YOUR MEMBER PARTICIPATE IN A SIGN-ON LETTER, SUPPORT FUNDING, OR CONTACT CONGRESSIONAL LEADERS)

Goals:
• Strengthen existing relationship (OR BUILD NEW RELATIONSHIP) with (SENATOR/REPRESENTATIVE X);
• Give the Member an idea of how policies are being implemented in the community;
• Educate and inform congressional offices; and
• Elicit commitments from Members.

Timeline/Tasks

<table>
<thead>
<tr>
<th>DEADLINE</th>
<th>TASKS</th>
<th>PERSON RESPONSIBLE</th>
</tr>
</thead>
</table>
| 4-5 Weeks Prior to Ideal Time for Meeting | • Identify which elected representatives we want to meet with and when.  
• Create work plan and timeline.  
• Identify other key stakeholders we want to invite, and ask them if they would attend. |                   |
| 3-4 Weeks Prior to Meeting    | • Fax AND email the DC (or local, if appropriate) office a formal letter requesting a constituent meeting with the Member. Copy the staff person who works on the policy issue that we are highlighting.  
• A few days later, follow up on our request with a phone call to ensure receipt and progress. |                   |
| 2-3 Weeks Prior to Meeting    | • Continue to follow up with our point of contact in the congressional office until date/time is confirmed. |                   |
| 2 Weeks Prior to Meeting      | • Set an agenda for the meeting (see sample agenda).  
• Begin research and preparation of local materials. |                   |
| 1-2 Weeks Prior to Meeting    | • Prepare one-pagers and leave behinds on our programs and the policy request.  
• Do a practice run-through of the agenda. |                   |
| 1 Week Prior to Meeting       | • Confirm date and time again with congressional office.  
• Confirm number of attendees and give to scheduler. |                   |
| During the Meeting            | • Make sure attendees arrive early.  
• Remember to tie the conversation to the community.  
• Explain what specific action we want the Member to take.  
• Ask when and with whom we can follow up. |                   |
| Within 1 Week Following the Meeting | • Send a thank you letter restating commitments made during the meeting (see sample thank you letter).  
• Follow up at the appropriate time with the relevant staff member on the policy issue, and answer any remaining questions. |                   |
PLACE ON YOUR LETTERHEAD

Attention Scheduler

TO:  (SENATOR/REPRESENTATIVE X)
ATTN: (SCHEDULER)
CC:  (STAFF PERSON WHO WORKS ON RELEVANT POLICY ISSUE)
FAX:  (FAX NUMBER)
FROM:  (YOUR NAME / ORGANIZATION)
RE:  Visit from Constituents
DATE:  (DATE)

Dear (SENATOR/REPRESENTATIVE X),

(TRY TO INCLUDE AN ESTIMATED NUMBER OF CONSTITUENTS AND/OR DESCRIBE WHO WILL BE COMING) will be in Washington, DC from (DATES AND REASON FOR BEING IN DC). We would like to meet with (SENATOR/REPRESENTATIVE X) and appropriate staff to discuss (POLICY ISSUE).

Preferably, we would like to schedule a time between (TIME AND DATE). I will call you to follow up in the next week to identify the best date and time for a meeting with the (SENATOR/REPRESENTATIVE). In the meantime, you can contact me at (PHONE NUMBER AND EMAIL).

(BRIEFLY DISCUSS INFORMATION ABOUT WHAT IS GOING ON LOCALLY, YOUR PROGRAM, OR MORE INFORMATION ON THE ISSUE YOU WISH TO DISCUSS.)

Thank you for your time. I look forward to the meeting in (MONTH).

Sincerely,
PLACE ON YOUR LETTERHEAD

The Honorable (FIRST AND LAST NAME OF MEMBER)
U.S. SENATE / U.S. HOUSE OF REPRESENTATIVES
Washington, DC (SENATE ZIP CODE IS 20510; HOUSE ZIP CODE IS 20515)
Attn: Scheduler and (STAFF PERSON WHO WORKS ON RELEVANT POLICY ISSUE)
FAX: (FAX NUMBER)

Dear (SENATOR/REPRESENTATIVE X),

I am writing to support the recent request you received to attend a meeting with (TRY TO INCLUDE AN ESTIMATED NUMBER) of your constituents who will be in Washington, DC from (INSERT DATES).

The group would like to take this opportunity to thank you for (THANK HIM/HER FOR SOMETHING SPECIFIC OR GENERALLY FOR HIS/HER SUPPORT), demonstrate the success of local homelessness assistance programs, and discuss how we can continue to work together to advance (INCLUDE A SPECIFIC POLICY ISSUE).

(INCLUDE LOCAL INFORMATION ABOUT HOW THE POLICY ISSUE IS RELATED TO YOUR COMMUNITY’S PROGRESS. FOR EXAMPLE:

- YOUR COMMUNITY’S TEN YEAR PLAN TO END HOMELESSNESS;
- YOUR PROGRAM’S ACCOMPLISHMENTS, HOW MANY PEOPLE YOU HAVE SERVED, HOW MANY PEOPLE HAVE BEEN RE-HOUSED;
- A STORY ABOUT SOMEONE’S HOMELESSNESS THAT WAS PREVENTED OR ENDED; OR
- INTERESTING PARTNERSHIPS.)

The group is looking forward to meeting with you in Washington. Thank you in advance for your consideration of this request. I look forward to continuing to work with you on this critical issue.

Sincerely,
Increase Section 8 Funding and Strengthen Rental Assistance Programs

The Supportive Housing Network of New York urges Congress to increase the number of Section 8 rental vouchers and improve the coordination and administration of HUD’s rental programs. Congress can accomplish these goals by appropriating funding for 200,000 new Section 8 Housing Choice Vouchers in FY 2011 and enacting the Section Eight Voucher Reform Act (SEVRA).

Section 8 rental vouchers help make housing affordable for over two million households, including over 222,000 throughout New York State. Section 8 is used exclusively for low-income households, predominantly families with children (54%), the elderly (17%) and people living with disabilities (19%). 75 percent of the funds are targeted at households living at or below 30 percent of the area median income ($20,550 for a family of four in New York State).

Across New York State, waiting lists for vouchers are either several years long or closed at a time when demand is escalating due to the economic crisis. Housing affordability continues to be a serious issue in New York. Among the 3.3 million renters in New York, more than half (58%) were living in unaffordable apartments. New York State also continues to be among the states with the highest percentage of their population experiencing homelessness annually: using the most recent data available, New York State ranked 6th highest in the nation with 61,067 persons homeless on a given night. Between the homeless households and those with unsustainable rent burdens, the number of eligible families on the waiting list for Section 8 – in New York City alone – is over 125,000.

There are several pieces of legislation that would increase funding for existing programs and create new rental assistance initiatives, addressing Section 8 shortages in New York City, New York State and across the country.

Section Eight Voucher Reform Act (SEVRA)
SEVRA would create new vouchers to increase affordable housing options and offer much needed reforms to streamline the Housing Choice Voucher program. The legislation, which was approved by the House Financial Services Committee in 2009 and awaits action by the full House, would:

- Authorize 150,000 new vouchers over 3 years.
- Base funding allocations on local public housing agency’s actual spending in the previous year and allow unspent balances to be reallocated to areas with greater need.
- Simplify rent calculation, income verification, and inspection processes.

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1 Center for Budget and Policy Priorities analysis of HUD RCR Data from December 1, 2007 through March 31, 2009.
2 NLIHC Out of Reach 2010 report. Unaffordable housing is defined by a household paying more than 30% of their income on rent.
Housing and Services for Homeless Persons Demonstration
We ask Congress to provide $85 million in the Transportation, Housing and Urban Development budget to fund the Housing and Services for Homeless Persons demonstration project. Through the project, HUD’s Section 8 voucher program would house 4,000 chronically homeless individuals and 6,000 homeless or at-risk families. The rental assistance will be combined with services provided by funding from SAMHSA, Medicaid, and TANF and require an additional appropriation of $16 million within the HHS budget. The demonstration promotes the necessary federal cross-agency collaborations that have the potential to greatly improve homelessness assistance.

HUD-VA Supportive Housing (VASH) Program
Congress should provide $75 million for the HUD-VASH program to house approximately 10,000 homeless veterans in FY 2011. HUD-VASH offers homeless veterans a Section 8 voucher combined with case management and clinical services at community VA medical centers. VA data shows that on any given night in 2008, there were approximately 131,000 homeless veterans in the U.S.

Preservation, Enhancement, and Transformation of Rental Assistance (PETRA)
HUD’s PETRA proposal holds the promise of alleviating the nation’s chronic underfunding of public housing buildings and reversing the loss of public housing units into the private housing market. Under PETRA, public housing authorities would gain the ability to take private loans on public housing buildings to finance capital needs by converting to a new form of project-based rental subsidy. PETRA would allow up to 300,000 HUD-subsidized housing units, mostly public housing, to convert in FY 2011.

This influx of capital and operating funding is needed to sustain existing public housing, but before the proposal becomes final there are several safeguards which Congress should work with HUD to include:
• Require public housing buildings that receive capital funding for conversion to demonstrate physical plant needs and require applicants to use new funding resources for the physical preservation of properties.
• Establish clearer guidelines to replace physical public housing units, so that a minimal amount of physical units are lost in the transformation.
• Include language that ensures public housing units remain affordable in perpetuity, rather than the 30 year restriction currently recommended.
• Commit adequate service funding to meet the special needs of all tenants currently in public housing.
HUD Homeless Assistance Funding in Illinois’ 7th Congressional District
Representative Danny Davis

How HUD Homeless Assistance Funding Benefits the 7th Congressional District

<table>
<thead>
<tr>
<th>FY09 Dollars</th>
<th>FY09 Beds</th>
<th>FY09 People Served</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>7th Congressional District:</strong> $12,142,624</td>
<td><strong>Total:</strong> 2,273</td>
<td><strong>Total:</strong> 4,591</td>
</tr>
<tr>
<td><strong>31% of Chicago’s HUD Allocation</strong></td>
<td><strong>Dedicated for Veterans:</strong> 15</td>
<td><strong>Veterans:</strong> 60</td>
</tr>
<tr>
<td></td>
<td><strong>Dedicated for Youth:</strong> 32</td>
<td><strong>Youth:</strong> 339</td>
</tr>
</tbody>
</table>

The Impact on Chicago of Increasing HUD’s Homeless Assistance Funding

For more information, contact:
Nicole Amling, Director of Public Policy
(312) 223-9870, ext. 12
namling@thechicagoalliance.org
Meeting Exhibit 6: Sample Meeting Agenda

The sample agenda below can be used to help you outline the planned agenda for your congressional meeting.

1. **Introductions (BRIEF)**
   - All attendees introduce themselves and their agency and say one or two sentences about their involvement with the issue of homelessness. If there are more than 3 people in the meeting, the chair might want to do the introductions.
   - Mention any relationships you have with acquaintances of your senator or representative.

2. **Thank the senator/representative for something**
   - We would like to take this opportunity to thank you and your staff for your dedication to improving polices that will allow us to better address homelessness in [COMMUNITY].
   - What is the senator's/representative's history of support on this issue?
   - Thank him/her for something specific. For example, co-sponsorship of or work to support legislation, a federal appropriation for your agency, or visiting your program recently.

3. **Purpose of the meeting**
   - We are here today to talk to you about the local progress being made in [CITY/STATE] to implement solutions to homelessness and how we can work together to advance our progress. Specifically, we ask that you work in support of [RELEVANT POLICY ISSUE]. Information about current policies is available on the Alliance’s website. The Alliance can help you decide how your Member can have the most impact.

4. **Tell local stories of personal and community-wide success**
   - Members are more likely to support your request when you can demonstrate how much you have accomplished with the resources that you have. This shows that you obviously can put the resources to good use.
   - Share any community or program-related outcome data. Describe what you do, and concretely explain why your program works. Relate the policy issues to your community’s success.
   - Tell the story of how you (or an individual/family you know) benefited from a local homeless assistance program.
   - Share information about your community’s 10-year plan to end homelessness.
   - Discuss the involvement of interesting partners in the community who have come together in your local movement to end homelessness (i.e., business owners, community organizations, local leaders/elected officials).

5. **Describe how this policy issue will impact homeless people and programs in your community**
   - Discuss the number and types of individuals, families, or youth who would benefit from the policy, as well as how they would benefit.
   - The Alliance can help you decide what to say if you are not sure.

6. **Make a SPECIFIC ask**
   - We ask that [SENATOR/REPRESENTATIVE X] (i.e., send a letter, sign a congressional sign-on letter, co-sponsor legislation, etc.).

7. **Response from Member/staff**
   - Think about what questions you expect the Member to ask, based on past contact with him/her.
   - If the meeting is with a staff person (not the Member), the staff person will have to ask his/her boss before giving you an answer. Ask when you can follow up with him/her.
   - If the Member of Congress is there, you should ask, “Who on your staff can I follow up with?”
   - If you get a …
     - **Yes:** Say: “Wonderful!”
     - **Maybe:** Ask: “Is there any additional information I can provide to help you decide?”
     - **No:** Say: “Is there a reason why you will not do this? Is there any information I can provide that might address some of your concerns?” [This is an excellent opportunity to keep the lines of communication open.]

8. **Closing**
   - Summarize any commitments made by the Member/staff.
   - Repeat any questions you need to answer in follow up that you couldn’t answer in the meeting.
   - Thank them, and ask when and with whom you should follow up.
   - Invite them to see a local program next time they are at home.
Meeting with _______________________________

1. **Purpose of the meeting**

   ____________________________________________

   ____________________________________________

   ____________________________________________

   ____________________________________________

   ____________________________________________

2. **Introductions (BRIEF)**

3. **Thank you**

   ____________________________________________

   ____________________________________________

   ____________________________________________

4. **Tell stories of success**

   ____________________________________________

   ____________________________________________

   ____________________________________________

5. **Describe how this policy issue will impact homeless people and programs in your community**

   ____________________________________________

   ____________________________________________

   ____________________________________________

   ____________________________________________

6. **Make the ask**
   
   We ask that Senator/Representative: ____________________________

   ____________________________________________

7. **Response and Questions**
   
   Think about what questions you expect the Member to have based on past support of specific issues or past contact with him/her.

   ____________________________________________

   ____________________________________________

   ____________________________________________

   Think about how you will respond to questions the Member or staff might have.

   ____________________________________________

8. **Closing**
   
   Thank you for: ____________________________________________

   ____________________________________________

   Summarize any commitments made by the Member/congressional staff. Repeat any questions you need to answer in follow up (that you could not answer in the meeting) and any additional information you need to provide.
Meeting Exhibit 8: Sample Thank You Note
You can use this letter as a template for drafting your note of thanks for the congressional meeting.

PLACE ON YOUR LETTERHEAD

(DATE)

The Honorable [FIRST AND LAST NAME OF MEMBER]
U.S. SENATE / U.S. HOUSE OF REPRESENTATIVES
Washington, DC [SENATE ZIP CODE IS 20510; HOUSE ZIP CODE IS 20515]
Attn: Scheduler and [STAFF PERSON WHO WORKS ON RELEVANT POLICY ISSUE]
FAX: [FAX NUMBER]

Dear [SENATOR/REPRESENTATIVE X],

I want to thank you for taking the time to meet with me while I was in Washington, DC last week. I greatly appreciate your efforts to advance federal policies that will allow communities like [CITY] to continue preventing and ending homelessness.

[RESTATE THE POLICY ISSUE.]

[SUMMARIZE ANY COMMITMENTS MADE, FOR EXAMPLE: STATE AN AGREEMENT YOU MADE TO SEND MORE INFORMATION, A COMMITMENT FROM THE MEMBER TO TAKE ANY SORT OF ACTION IN SUPPORT OF THE REQUEST, A COMMITMENT BY THE MEMBER TO VISIT YOUR PROGRAM, OR AN AGREEMENT THAT YOU MADE TO FOLLOW UP WITH HIS/HER OFFICE AT A PARTICULAR TIME.]

Thank you for your consideration of this request. I look forward to continuing to work with you on this crucial initiative and welcome any request for additional information.

Sincerely,