Tips for an Effective Congressional Visit

1. Plan carefully with your team for the visit.

- Determine who will attend meeting(s) with your congressional members with you. Other allies in the disability field, including parents and self advocates affected by the issue, are good candidates for a team visit.
- Set a meeting with your congressional member(s). Phone numbers for local offices are listed on your congressional members' websites, or linked via www.house.gov, and www.senate.gov.
- Identify the issue(s) you wish to address with your elected, and formulate a clear ask around each issue.
- Do your research on the Member of Congress and/or the staff you will be meeting with.
- Familiarize yourself with the talking points and the leave behind packet.
- Use your talking points to guide your agenda for the meeting, refer to the Sample Agenda below.
- Reconfirm time and location of meeting in advance and allow for enough time to get to your next meeting.

Sample Meeting Agenda

1. **Introductions** – introduce yourself and your role as it relates to the issue you are discussion, personally and/or professionally; clearly state the purpose of your meeting and the schedule timeframe. This is also a good time to distribute business cards and to thank the elected for his/her support on a particular issue, if appropriate.

2. **Relationship Building** – learn a little about the staffer's role, personal history, values, hopes/dreams, etc. Be particularly attentive to thoughts and feelings.

3. **Compelling Story and Ask** – offer a compelling story about the issue. This provides political framework/connection that the elected needs to represent the best interests of his/her constituency. Make the "ask." What is it that you wish to see the elected do in response to the issue? Press for a commitment.

4. **Questions and Clarification** – provide time for the staff to ask questions. If you cannot answer a question, use the question as an opportunity to follow up later with elected/staffer.

5. **Wrap-up**—summarize the content of meeting and actions/commitments that have been agreed upon; and get contact information, exchange business cards with the staff.

6. **Thank-you** – thank the staff for his/her time and leave—on time.

2. Arrive in advance of scheduled meeting time. This is an act of courtesy, and it also provides visit team with time to review agenda and roles. (If you think you will be late or an emergency occurs, please call the office to let them know where you are and to determine whether you will need to reschedule.)

3. While in the meeting, extend these courtesies:

- Respect the time of the staff
- Remain attentive to the staffer and team members
- Stay focused on the agreed-upon agenda and issues

4. Evaluate meeting with visit team immediately following the appointment, and complete a brief report to submit to your State Team leader about the visit (or to btrader@tash.org):

- Who did you meet with? Which Member Office? Email address?
- Date/ time of meeting?
- Did the staff person or Member express support for the issue? What, if any, commitments were made?
- If not, any expressed concerns/ questions?
- Planned follow-up?
- Other comments/ observations?

5. Send thank you to elected/staffer within 24-48 hours of meeting.

6. Follow up on any actions committed to at meeting according to timeframe established in meeting.