TRAINING ACTIVITY:

MEETING WITH REPRESENTATIVES

BY LIZ BAKER AND TAYLOR SCOTT, 2/9/2019

Purpose

Research on children and families has the potential for social impact if it informs decisions in communities and at scale. One way for researchers to support such change is by forming relationships with policymakers. Policymaking is a highly interactive process guided by trusted information sources; therefore, researchers should aim to translate knowledge within the context of enduring professional relationships with decisionmakers. However, many researchers are not engaged with policymakers. To bridge research and policy, we need more trusting, consultative interactions. In fact, many studies highlight the importance of collaborative relationships to increase the use of research evidence in policy[1]. Congressional staff frequently experience interactions involving requests from advocates; less often are individuals offering (free) nonpartisan, credible sources. This is a role for which researchers are well-equipped.

The purpose of this training is to help you gain experience engaging with policymakers and open the door to a mutually beneficial relationship – one that may provide resources and support to policymakers as well as potentially inform your future research, strengthening its potential utility and impact.

For this exercise, you will: (1) identify your representative, (2) schedule a meeting with him/her to volunteer yourself as a resource to him/her, (3) prepare for and have the meeting, (4) identify action steps to continue cultivating a relationship, and (5) reflect on the process.

1. IDENTIFYING YOUR REPRESENTATIVE

You have three federal representatives: one from the house and two from the senate. For purposes of this exercise, you will only be meeting with **one** representative, so decide for yourself with whom you would like to meet. Do some "homework" to identify which representative shares interests corresponding with your work. Remember, you want to cultivate a relationship with your representative so identifying someone who has common interests will aid in the process!

Use the links below to identify your representatives, then peruse their official website (ends in .gov):

- House: https://www.house.gov/representatives/find-your-representative
  - Type in your zip code, click on your representative's name (in blue)
- Senate: https://www.senate.gov/senators/index.htm
  - Scroll down to the "116th Congress" section. Type your state into the search bar and click on your representatives' names (in blue)

[1] Oliver, K., Innvar, S., Lorenc, T., Woodman, J., & Thomas, J. (2014). A systematic review of barriers to and facilitators of the use of evidence by policymakers. *BMC health services research*, *14*(1), 2.

There are many ways to search a representative's website to figure out what issues s/he is interested in. The simplest way is to use the "search" bar and type in your area of expertise. For example, you could type in "Domestic Violence" or related subject matter (e.g., women, violence) to figure out if your representative has any interest or involvement in related policy efforts. You can also peruse the website menu to identify their "Issues", "Bills", and "Congressional Caucuses". Each representative's website will be different, but they will all describe information related to their interests.

Make sure to note the location of the representative's office, as this will be important to consider when scheduling your meeting (step 2). Federal legislators have offices in their districts or in numerous locations in states they represent. Information regarding office locations are located on their websites, usually at the very bottom of the page. For most researchers, meetings in the local office allow for more frequent contact than meetings requiring travel to the Capitol in Washington, DC.

While it may be possible to meet with your representative in the local office, you will most likely meet with a member of his/her staff. Staff members are gatekeepers and policy shapers, as they are the individuals who write legislation and position statements that then are sent to constituents and other lawmakers. Do not make the common mistake of undervaluing staff members! Instead, make sure to be courteous to *all* staff members throughout the process as lasting relationships will staff members will help you achieve the ultimate goal of supporting the use of research evidence in policy.

Thus, you should identify your chosen representative's office and then determine who you should schedule a meeting with (again, likely a staff member).

*MORE ON LOBBYING

Lobbying involves taking a stance on a specific change to policy.

Our goal is NOT to lobby, but rather to educate lawmakers by helping them understand what the science says on certain policy issues.

Instead of providing a specific and narrow recommendation for a law change, we may provide a range of divergent policy options based in research.

2. SCHEDULING A MEETING

Once you know who your representative is, how do you schedule a meeting?
On each representative's website will be a "Contact" section. That section will either provide an email address or will direct you to a form (that then gets sent out as an email). This email will be sent to a scheduler who can help direct you to the correct staff member.

Crafting your email

- Keep emails short and to the point yet provide enough information so the staffer knows your reason for contacting him/her. A single staff processes 100's of emails a day, so those that are longer than a few sentences are less likely to be addressed fully.
- The purpose of the meeting is to connect with your representative, so you can offer yourself as a resource to him/her. Remember that policy staff are used to interactions that involve responding to asks from advocates (e.g., "Expand Medicaid"); seldomly are individuals offering themselves as resources to share nonpartisan, credible information to help inform decisions. Researchers are particularly well-equipped to do this kind of work.

- Keep in mind that you are NOT setting up a lobbying* meeting. The purpose is NOT to influence your representative on a particular issue, but rather to understand their needs and offer your support. If you found a common area of interest when perusing your representative's site, you might consider mentioning that in the email!
- Provide specific times you are available to meet in the body the email. Make sure you've accounted for driving time when scheduling your availability.

Dear Marcia Fudge,

My name is Liz Baker and I am constituent living in Cleveland, Ohio.

I'd like to meet with you or someone in your office regarding how I can support policy efforts related to [as an example] domestic violence prevention. I am a researcher and would like to better understand your related interests and priorities so that I might offer myself as an independent resource.

Do you have any availability the week of December 1st? I am free after 2 PM every day that week.

I look forward to connecting with you!

~Liz

If you would like to meet with your actual representative (and not a staff member), you may try crafting an email like the one below. You can look up your representative's calendar online (https://www.rollcall.com/news/politics/roll-calls-2019-congressional-calendar). When the calendar indicates recess, your representative will most likely be in his/her local office.

Dear Marcia Fudge,

My name is Liz Baker and I am constituent living in Cleveland, Ohio.

I'd like to meet with you regarding how I can support your policy efforts related to [as an example] domestic violence prevention. I am a researcher and would like to better understand your related interests and priorities so that I might offer myself as an independent resource.

I would like to find a time to meet with you when you are in your local office. I believe you are in Ohio the weekend of December 14th and the weekend of December 21st. Is there a way for us to try and meet during that time? Thank you so much for your time.

I look forward to connecting with you!

~Liz

Making a phone call

- You may prefer making a phone call (telephone provided at the bottom of most websites). You can call the office and ask who the person is who handles the issue you are interested in. As always, *make sure to express gratitude throughout your interaction*! Being kind to all staffers along the way will help in forming a relationship with your representative. See the example below:

> Good morning! My name is Liz and I'm live in Cleveland Heights (indicating constituency). I would like to meet with someone in the local office about policies to prevent domestic violence. Could you please tell me which staff is the best person to talk to about this? What is the best way to schedule a meeting with them? Thank you!!

No response? How to follow up!

Even the best crafted email can be ignored, so persistence is critical! Don't expect an immediate response; sometimes it takes a few attempts before hearing back. You can try sending another email through the website or calling the office.

The decision about how often or soon to follow up is a balancing act. One or two follow-up email/phone call/visit per week is recommended when you are scheduling weeks out in advance. You may contact the office multiple times in a week if you need to schedule quickly and have not received a response.

3. ONCE YOU HAVE A MEETING SET, HOW DO YOU PREPARE FOR AND EXECUTE IT?

BEFORE THE MEETING

- Pack a notepad and your business card (also expect a business card in return). Congress is very old school and paper-based. If you bring any handouts, make sure it is no more than two pages.
- Prepare for a meeting that will last 15 – 30 minutes long. Meetings are short, so make the most efficient use of your time by preparing in advance. You need time to tell them who you are, but also to listen to them.
- Consider your talking points and how you will use a brief amount of time to convey the most important point about your role, then elicit information relevant to the issue area. You might think of this like a simple meeting agenda including the points on the following page:

Introductions

- Who you are
- What your background is

Offer yourself as a (free) source of credible, unbiased, and scientific information

- State why you want to help
- You could explain that you are “flipping the norm”, such that you are not coming to him/her with a specific agenda or ask, but rather that you are understanding his/her agenda to better serve his/her needs.
- You may want to discuss a topic of research that is relevant to his/her district/state. You'll have to do some reserach beforehand to figure out what those topics might be. Use google, social media, the representative's website, etc. This will help to orient you to opportunities for action and how to frame the issue in ways that the align with what you already know about the reresentative's priorities!

  For example: "I want to help you understand the science behind issues that are relevant to your district. I know a lot of people come into your office with a specific agenda or ask of you. However, I'm here for the opposite reason. I'm here to ask you what *your* agenda is, and if there is anything I can help with. For example, if you wanted to better understand ways to prevent domestic violence (something that is very prevalent in our state), I can help with that."

Tell a story about your research

- Humans are hardwired to remember stories, so you can craft one to make sure you connect with your representative in a memorable way.
- Stories also make it easier for the non-researcher to simplify information about important issues that are digestible to not just the policymaker, but to his/her constituents, which thus make related policy actions more or less viable.

HOW DO YOU TELL A GOOD STORY?

A quality story includes **characters** within a **setting**, involved in a **plot** marked by **conflict** that is (or could be) **resolved**. These stories should emphasize context impacted by policy issues.

Don't frame your story around individuals and specific events (i.e., episodic), as this can backfire and have your audience believe the responsibility for the problem (and solution) lies with the individual.

Do frame your story through a thematic lens, which focuses on the "bigger picture" and points to how larger *systems and structures* led to the problem, as well as how they can solve it. These kinds of stories are more effective when speaking to policymakers.

- Discuss the people your research affects (who are they?)
- State your goals (how does your research improve those people's lives?)
- State the problem your research addresses
  - Establish size and scope of the problem (*include select statistics specific to their district or state),* making sure to put it in context.
- Discuss solutions (what does research say about addressing the problem?)
  - Emphasize systemic supports or challenges that help or hinder people. For example, was it access to a community resource? Your story should focus on triumph due to systemic conditions.
- Leave with a call to action
  - What opportunities are there for people to take specific action to address this problem?

Come Prepared with Questions to Help the Conversation!

Ideally, the conversation will flow effortlessly. However, that is not likely to happen. In fact, it is very likely that they may not have any ideas about how to use you as a resource. So, be prepared for that!

Have a few questions that will start a conversation about how you could support his/her office.

For example:

- What is Rep/Sen X's position on topic Y?
- If you had a magic wand, in what way could federal policy address issue Y?
- What is one topic you wish you knew more about?
- Are there any policies for which you'd like to predict the outcome?

Based on their responses, you can provide a few examples of how you might help. For example, summarizing research on topic X or getting them in contact with an expert on topic Y.

DURING THE MEETING

- Be friendly and open, remembering that you are there as an ally. Not as a lobbyist. Staff are generally expected to be cordial in all meetings (especially with constituents), so anticipate a non-controversial meeting; however, it can sometimes be difficult to derive detailed information, so you may be steadfast in asking follow-up questions to determine where or how to find more specific information.
- When discussing the interests of the legislator, be cautious about being too suggestive. However, offering a range of divergent policy options is consistent with the notion of being an "honest broker" of scientific information.
- Use a notepad to take notes during the meeting and anticipate clarifying these subsequent to the meeting.
- Conclude by summarizing action steps.
- Make sure to thank the staffer for his/her time before leaving!

4. AFTER THE MEETING, WHAT SHOULD YOU DO TO CONTINUE YOUR RELATIONSHIP WITH THE REPRESENTATIVE?

After meetings with legislative staff, send a brief note thanking them for their time and highlighting any action steps.

Complete your tasks on time and follow-up with updates. Anticipate scheduling another meeting in-person or by phone to discuss progress on action steps. You may email updates as well, but lengthy emails are often dismissed, so it's usually best to schedule a follow-up meeting to discuss and debrief.

After completing tasks, assess how you can further the partnership. For example, sometimes minor requests can develop into further requests. Or maybe if the representative is not assigned to work on issues related to what you do. If so, try to find out if there is a way for you to be a resource on related topics!

5. REFLECT ON THE PROCESS

Reflection is an important process that helps develop your skills. By journaling about what went well and what could have gone better, you can better prepare for future interactions with policymakers. Please take some time to journal about your experience using the prompts below:

During the meeting, did you feel prepared? If so, what do you think helped you to feel prepared? If not, what do you wish you would have done differently?

What was the most challenging aspect of the meeting? Looking back, what could have helped you handle it with more ease?

Do you feel the staffer was receptive to your offer (before, during, and after the meeting)? Why or why not?

Any other thoughts you'd like to share?