TRAINING ACTIVITY:
MEETING WITH REPRESENTATIVES

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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 knowledge about how to engage 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. Consistent with the Research-to-Policy Collaboration objectives, these meetings are educational in nature and do not involve lobbying.*

For this exercise, you will learn how to: (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.

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[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.

1. IDENTIFYING YOUR REPRESENTATIVE

You have three federal representatives you could potentially meet with: one from the house and two from the senate. If you decide to actually schedule a meeting with your representative, you might consider choosing someone who (1) has an office close to you and/or (2) has priorities that are relevant to your work. However, it is not necessary to have overlap between your research and his/her policy priorities.

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. Although the local office may be most accessible geographically, staff handling legislative issues most often work at the Capitol in Washington, DC. Therefore, you may seek guidance from the legislative office on who is the best person to meet.

Most often, meetings occur with staff, not the elected official. 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.

*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.

To identify which legislative office you want to arrange a meeting with, you may explore the issues s/he is interested in. There are many ways to search a representative's website to figure that out. For example, you can 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. You could also use the "search" bar to type in topics of interest to you.

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

House: https://www.house.gov/representatives/find-your-representative

Senate: https://www.senate.gov/senators/index.htm

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 receive a response.
- 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 general needs and offer your support.
- 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 Heights, Ohio.

I am a researcher at Kent State University and I'm interested in how I might be able to volunteer my research skills to support you and your staff in your efforts related to women's issues[+].

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

I look forward to connecting with you!

~Liz

[+]*It's a good idea to make the topic area of interest broad, as you may not have interests that align perfectly. For example, if you study domestic violence you may choose to broadly discuss "women's issues". That way, you open up the conversation to a wide range of topics to discuss.*

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 to schedule a meeting with as a constituent.
- 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 how research can support your policy efforts. 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 also gaining information about how you might be able to offer yourself as a resource. You might think of this like a simple meeting agenda including the points below:

Introductions/your purpose for being there

- Who you are/what your background is.
- 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.
  - Make it clear that you are an independent researcher who is offering time *voluntarily*.

Ask about their policy issues

- *"What issues do you typically work on?"*
- *"What policy issues is the Congress(wo)man interested in related to [your area of research; e.g., families]?"*
- *"What legislative efforts do you anticipate in this area later this session?"*

Identify ways to get involved

- *"I'd like to find opportunities for getting involved as a researcher. Interpretation and discussing potential implications helps to make meaning from research. I could help provide perspective on issues at different stages of the policy process - from brainstorming to considering pending legislation."*
- If they are receptive, you might ask questions such as: *"What are some ways I could support the work you are doing?"* and *"Are there specific times of the year when you think I could be most useful?"*
- If they seem skeptical: *"I recognize this is not your typical meeting because I'm not asking you for specific policy changes. Is there any way that I can address your concerns?"*

Conclude with a Summary and Thanks

- After your conversation, make sure to conclude with a summary. It may seem redundant, but repeating back what you learned will help make sure you are both on the same page. Based on that, you may offer to follow-up via email within the next few days.
- Thank them for their time!

Come Prepared with Questions to Help the Conversation!

Ideally, explaining your intended role and inquiring about current legislative interests could facilitate a seamless conversation. However, because this is an unusual type of interaction for most staff, they may struggle to generate 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:

- 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 main points from your conversation and describing any action steps. Make sure to clarify expected timeline on any follow-up tasks.
- 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. Even if there are not immediate action steps for follow-up, you should still send a brief thank you note. You never know when you might be able to form a relationship with them in the future. Furthermore, you can continue the connection remotely via email by sending them occasional updates on issues related to their areas of interest.

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?