

Face-to-Face Meetings

Members of Congress have an innate desire to respond positively to constituent requests. Requests of a minor nature—such as help finding a missing Social Security check—can be submitted via letter or email. Requests which involve a “heavier lift” should be made face-to-face. This Best Practices Guide describes how to approach a Member to request a personal meeting in their Washington or state/district office and provides some specific meeting suggestions.

Senators and representatives have an office in Washington and at least one office in their state or district. Members divide their time between offices depending upon whether Congress is in session or not. As described in another Best Practices Guide (*Congressional Offices and Staff*), legislative matters are usually handled by staff in Washington and constituent services (such as missing Social Security checks) are handled in-state. The advice which follows applies to meetings with the Member in any of their offices and legislative and/or other staff in Washington.

MEMBER MEETING REQUESTS

Senators and representatives receive dozens of meeting requests each day and generally have a scheduler in Washington and (often) another back home to deal with such entreaties. Most offices have strict requirements for submitting Member meeting requests. Generally, requests must be put in writing and tendered by fax, email, or on-line form. It goes without saying that these procedures must be followed exactly.

But, it's the substance of the request that's especially important. If you want a face-to-face meeting, you absolutely must convince the scheduler and ultimately the Member that such an appointment is in fact worthwhile. Make sure to tell them: (1) who you are; (2) who you represent; (3) why you need a face-to-face meeting; and (4) the matter you plan to discuss.

Even if you make a persuasive case and are a very important person you may still not be able to obtain a meeting with the Member. Do not be offended if this is the case, especially if you are trying to secure an appointment with a



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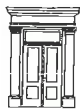
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senator from a large-population state. We know of Fortune 100 CEOs who are not able to get 15 minutes of a senator's time more than once or twice a year. In-office, face-to-face meetings with Members are rare and becoming more difficult to arrange with each passing year.

But, don't despair! Senators and representatives have bright, young, energetic staff and meeting with constituents is one of their primary responsibilities. *Remember this: talking to staff is, in most situations, just as useful as meeting with the Member directly.* In any case, as described in another Best Practices Guide (*Publicity, Politics, and Events*)

it is often much better to get face-time with a Member outside the confines of their office. Find them at town hall meetings, attend their fundraisers, and, above all, *get them on campus.*

Cornerstone Government Affairs works with several associations and other organizations who conduct Washington fly-ins once a year. The following suggestions were prepared to help those who participate in such annual citizen advocacy efforts, but are equally applicable to other meetings with Members and staff in Washington, D.C.

DOS AND DON'TS FOR CITIZEN ADVOCATES

- DO** make an appointment for you or your small (no more than three) group; showing up without an appointment is just not done! Appointments with representatives and senators themselves must be made through their Washington, D.C. scheduler following the procedures established by each office (usually an online form or a written request emailed or faxed to the scheduler).
- DON'T** show up too early, and don't show up too late (more than five minutes either way). If you are going to be more than five minutes late, call and advise the receptionist: "I've got an appointment with the congressman and we're going to be about ten minutes late." If you are early, wait in the hall.
- DO** be flexible. When Congress is in session, Members are often called to the Capitol for floor votes. If you get stuck in the whirling-dervish of a voting frenzy you may end up: meeting with a staff person; walking to the Capitol to spend three or four minutes with the Member; or (occasionally) cooling your heels indefinitely.
- DON'T** take this personally. Congress is a place where chaos is the norm. Remember the line from the deodorant commercial: "Never let them see you sweat."
- DO** keep in mind that talking to a staffer is almost the same as talking to the senator or representative directly. Congressional staff wield enormous influence.
- DON'T** go into an appointment without rehearsing your pitch. Make sure that everyone on your team knows what they are going to say before they say it. And, don't let one person do all the talking.
- DO** take a minute or two to introduce your group. It often works best if one person does the introductions: "Jane is from Smallville. She is president of the Family Manufacturing Company and also head of the school board. Jack is..." This is a perfect time to hand out your business cards.
- DON'T** spend a lot of time on chit-chat. Establishing rapport with the Member or the staff assistant is important. However, these are very busy people and they appreciate it if you get to the substance of the discussion as quickly as possible. **Most meetings these days last about 15 to 20 minutes!**

DOS AND DON'TS FOR CITIZEN ADVOCATES (CONT'D)

- DO** designate one person in the group who will refocus the discussion if it starts to drift "off message."
- DON'T** under any circumstances, get into an argument with a Member or their staff. You can disagree, but do so with a smile on your face. **And, never discuss politics, fundraising, etc. during a meeting on the issues. (This is ethically dangerous and, in the case of fundraising, likely illegal.)**
- DO** watch for subtle signs that the Member wants to end the meeting.
- DON'T** forget your next meeting. It is not impolite to say: "Thank you, for your time. If we don't leave now, we're going to be late for our next appointment."
- DO** leave behind materials that underscore the points that were made in the meeting. The team leader should have possession of the materials and judge when it is best to hand them to the Member or their staff assistant. **Leave behind documents must be succinct—no more than one sheet of paper (can be two-sided).**
- DON'T** forget to thank them for meeting with you.
- DO** get a business card from all staff who attended the meeting. If they don't have a card, make sure you ask for the correct spelling of their name and their title.
- DON'T** forget to send a follow-up email when you get back home (regular mail remains problematic due to security screening as a result of the 2001 anthrax attacks).
- DO** schedule appointments approximately 45 minutes apart if you are going to be working in the same congressional office building (e.g. Rayburn). Spend no more than 30 minutes in any one meeting. Allow about five minutes to walk underground between buildings on the same side of Capitol Hill (e.g. between Hart and Russell). Allow at least 30 minutes to walk between the House and Senate office buildings and to get through security.
- DON'T** waste a lot of time walking back-and-forth between buildings or between House and Senate. Schedule smart. Remember that the fewer times you must wait in line to pass through a metal detector the better. Whenever possible use underground walkways. (Note: Access to the Capitol itself remains severely restricted.)
- DO** expect your carefully crafted schedule to crumble into dust in your hands. If you go into the day expecting a little—or once in a while a lot—of schedule shuffling, then you will not be disappointed when the inevitable happens.
- DON'T** carry spare change or other metal items in your pockets. You will be going through metal detectors all day long, so leave your brass knuckles at home.
- DO** wear comfortable shoes and dress in business attire: suits and ties for men and business suits or dresses for women. If you carry a briefcase, make sure it's not too heavy.
- DON'T** forget to smell the flowers and check out the artwork. The Capitol and the office buildings contain a lot of symbolism and history.
- DO** **remember that honesty and sincerity are an advocate's greatest assets.**

