



# 13<sup>th</sup> Annual Washington Conference

May 9-11, 2011  
Westin Alexandria  
Alexandria, VA



## How to Schedule Congressional Meetings *Schedule Appointments for Tuesday, May 10, 2011*

### Planning Your Appointments (Logistics)

Attempt to group your meetings by Senate or House side, then by office building, then by floor to minimize back-and-forth travel that eats up valuable time (especially having to walk between the Senate side and the House side). Leave approx. 10-15 minutes between appointments to allow time to walk to the next location and go through security screening in each building. Allow for about 45 minutes-1 hour for traveling from the hotel to the Hill Tuesday morning. If your state is sending a large delegation, you might have a team leader who has already provided you with a tentative schedule for these appointments.

### When You Should Start Scheduling

**RIGHT AWAY!** It's never too early to schedule your appointments. You should have all of your appointments scheduled by April 26 at the *absolute latest*, or two weeks prior to the meeting date.

### Targets

Successfully scheduling a meeting with a congressional office depends on several factors, not least of which is reaching out to the right person within the office. There can be 10 or more staff members in an office, all of whom have very specific roles and duties.

### Key Congressional Staff Members

- **Chief of Staff:** Highest-ranking legislative staffer in the office of a member of Congress. Chiefs of staff are usually the chief operating officer of the office, reporting only to the Member (either a Representative or Senator).
- **Legislative Director (or Policy Director):** This is usually the staff person who monitors the legislative schedule and makes recommendations regarding the pros and cons of particular issues. *This might be a secondary target if an LA or LC is unavailable.*
- **Senior Legislative Assistant or Legislative Coordinator:** In some congressional offices there are several Legislative Assistants and responsibilities are assigned to staff with particular expertise in specific areas. For example, depending on the responsibilities and interests of the member, an office may include a different Legislative Assistant for health issues, environmental matters, taxes, etc. For the purposes of AMCA, relevant LAs would charge over Environment and/or Agriculture and Health. *This is most likely the person you'll be seeking to speak with during a Congressional visit. If possible, you should work with them directly to schedule a meeting.*
- **Appointment Secretary, Personal Secretary, or Scheduler:** The Appointment Secretary is usually responsible for allocating a member's time among the many demands that arise from congressional responsibilities, staff requirements, and constituent requests. He/she may also be responsible for making necessary travel arrangements, arranging speaking dates, visits to the district, etc. *If you are unable to locate a name for a Health or Environmental LA, call the scheduler and ask for this person.*
- **Other:** Other titles used in a congressional office may include: Press Secretary or Communications Director, Executive Assistant, Legislative Correspondent, Executive Secretary, Office Manager, and Receptionist.

### Resources for identifying staff contacts

A great (free) web-based resource that includes congressional staff names, responsibilities and some contact information is [Congress.org](http://Congress.org). You can search by the Representative or Senator name and also get information about his/her staff. The staff listing within this resource can be limited depending on the office, so you may be required to call the main number and ask for the person responsible for the issue.

If you want to purchase a comprehensive listing, try the Leadership Directories' [Congressional Yellow Book](#). This is very comprehensive and has full staff listings along with contact information. However, you can spare the expense by simply calling your congressional office and ask for the name of the staff person who handles your issue.

## Elements of a Good Pitch

### *The Call*

When calling a congressional office to schedule an appointment, make sure to note from where you're calling, who you represent, why you'd like to meet and when. If you don't already have it, be sure to collect the LA's name and e-mail address so you can maintain contact in the event of scheduling changes. Congressional offices receive dozens of similar calls a day, so they should be able to direct you to the right person. Basically, they know the drill.

### *The Follow-Up E-mail*

Shortly after your phone call with the office, send them an e-mail following up on your conversation:

- Re-introduce yourself and state who you're representing
- Tell them why you'll be in Washington and why you'd like to meet
- Give a brief overview of what topics you'd like to discuss
- Thank them again for their time and consideration

### *The Confirmation E-mail*

Once the meeting is set, follow-up via e-mail to confirm the date, time, and location of the meeting.

- Thanks them again for their time
- Remind them about the Congressional Reception AMCA is hosting Tuesday evening (attached a copy of the invitation from the online Tool Kit)
- Invite any questions they may have in the meantime and leave your contact information, including mobile phone number, in case any abrupt changes in scheduling need to occur.

## How to Actually Make the Appointments

Make sure that Congress is in session before reaching out to an office. <http://thomas.loc.gov/home/schedules>

1. Identify your congressional and staff targets
2. Send an e-mail to targeted LAs covering subject of meeting along with requested date and time.
  - a. If you don't have an email address for the targeted LA, call the DC office to schedule the appointment, and collect the e-mail information for the LA over the phone, for follow up.
3. Allow a day for LAs to respond. If you don't get an e-mail response in 24-48 hours, follow-up via phone.
  - a. Immediately after your phone conversation, send a follow-up e-mail to targeted LAs covering subject of meeting along with requested date and time
4. Confirm the meeting date and time once set via e-mail

### **What If You Can't Get an Appointment?**

In event you cannot get a face-to-face meeting with a Senator or Representative for Tuesday, May 11, try scheduling a meeting with one or more of **their staff or legislative aides**. Adjust to their time schedule, and reorganize the suggested tentative schedule to reflect their availability. If no one can see you on any of the issues we're discussing, ask them if you can drop off the AMCA Legislative Packet in their office on that day.

### **Before You Go**

About a week away, confirm all of your appointments, and remind your contacts about the invitation to the reception on Tuesday evening.

## Suggested Timeline

### **One month out**

- Identify congressional targets
- If possible, identify appropriate LAs
- Call/e-mail LAs requesting meeting date
- Follow-up/confirm via e-mail

### **One to two weeks out**

- Make sure the majority of your meetings are confirmed
- If not, follow-up

### **One week out**

- Make sure all meetings are confirmed
- Remind them about the AMCA reception Tuesday night

### **Onsite**

- Stick to your schedule and make AMCA proud!