



A Guide to Working with Members of Congress:

Building Stronger Relationships With Your Legislators

The Importance of Building Relationships with Congress

Members of Congress are called upon to consider and vote on a vast number of issues from health care to energy to farm policy and more. While they may be an expert on one or two issues, it is impossible to master every issue that comes before Congress. Elected officials rely on their own staffs' work, outside experts and, most importantly, constituent input to effectively represent the people of their district or state.

That's why they need — and want — to hear from you. As a hospital or health system leader, you represent a cornerstone of your local community and your local economy.

An ongoing dialogue with your elected officials is the best way to ensure they understand how the decisions they make in Washington, D.C., will affect their constituents back home. No one better than you can explain the complexities of health care delivery and the impact on your community.

Hospital leaders tend to limit communications with Congress to when a key vote affecting hospitals is scheduled. But it's just as important to build a relationship with legislators and to offer your expertise and counsel on a regular basis, so that when a critical issue arises, they'll seek out your opinion and give weight to what you say.

This guide provides tips on how to cultivate a relationship with members of Congress and their staffs, and advice for communicating more effectively and navigating the halls of Congress.

An important note: Under federal tax law, 501(c)(3) organizations, like hospitals, can, within permissible limits, engage in lobbying about issues, including communicating with any legislator or legislative staff member, where the principal purpose is to influence legislation. However, there is an absolute prohibition on 501(c)(3) organizations participating or intervening in any political campaign on behalf of or in opposition to candidates for public office.

If you have questions about what is or is not permissible, please consult with your lawyers and/or AHA legal counsel.

Introduce Yourself: Reaching Out to Your Legislators

Scheduling a personal visit — in either the member's district or state office, the Washington, D.C. office, or by phone or video — is an effective way to introduce yourself to your legislators and key members of their staff.

Most members of Congress handle scheduling requests through their website, which you can locate through either www.house.gov or www.senate.gov.

If you call the office to request a meeting, you'll likely be referred to the scheduler. Explain who you are, the organization you represent and the purpose of your meeting.

The health legislative assistant, legislative director or the chief of staff will likely participate in the meeting as well. (See "Who's Who in a Legislator's Office" at the back of this guide for more on staff roles).

A few tips to make setting up a meeting go smoothly:

- **Be flexible on the timing.** Remember, legislators are juggling priorities and have busy travel schedules. Many travel frequently between their home office and Washington and may have more availability to meet with you back home. Others travel home less frequently and may have limited availability to meet outside of designated district work periods, like the August recess. Be as flexible as possible with your time in order to make the most of their time.
- **Explain the purpose of the meeting and how long it will take.** If you need 20 minutes, ask for 20 minutes. Members will be eager to greet constituents, and they will usually have between 15 and 30 minutes available.
- **If you've scheduled a meeting by phone, send an email to the scheduler confirming the date and time.** If you've scheduled online, you're likely to receive a confirmation email from the office.
- **For video meetings,** send your materials to the office's staff and confirm the video hyperlink at least one day in advance.
- **On the day of the meeting,** arrive at least 10 minutes early for either an in-person or video meeting. Appropriate attire for in-person and video meetings is business formal. For video meetings, ensure you and other hospital representatives use a strong Internet connection. For in-person meetings, keep in mind that Capitol Hill office buildings have tight security procedures, and there may be long lines to enter the buildings. Bring background materials, preferably a one-pager about your organization — its size, history and role in your community. Bring extra copies for staff, as well as several business cards. Also, ask for staff's business cards during the visit and ask whether they prefer you to contact them by phone or email.

If you'd like to take a photo with the member and staff, please be sure to ask the scheduler about the policy in advance. Individual member offices set their own policies about photographs.
- **After the meeting,** send a follow-up email thanking the legislator and staff for meeting with you and expressing your desire to work together in the months and years to come. This also is a good opportunity to repeat the invitation to tour your hospital. And remember to thank the scheduler who arranged the visit on your behalf.

Tips for Giving a Tour of Your Hospital

A tour provides the opportunity to familiarize your legislator with what you do and the challenges you face. The purpose of the tour should be informative, not political. Hospitals are prohibited by law from employing resources to influence voter preferences or the outcome of an election. Please see the "Legal Do's and Don'ts" at www.aha.org if you have questions about permissible activities, or consult with your lawyers and/or AHA legal counsel.

Be patient with the scheduling process. It may take some time to fulfill a time-intensive and not time-sensitive request like a tour; but also be persistent so the office understands this is important. Once a date and time have been set, you're ready to plan a successful and productive visit. Here's a list of things you may want to keep in mind:

- **Prepare a fact sheet about your hospital.** Include important information, such as services provided, number of personnel, other locations, services within the community, awards, information about key people and interesting facts. This will give your legislator and his or her staff a quick and easy look at your organization and the role it plays in your community.
- **Arrange for a photographer** if you want photos of the visit for your internal communications, and check with the legislator's office about permissible uses of these photos for social media, etc.
- **Determine if press will be allowed into your facility.** Check with the legislator's office to see if they plan to notify the press of the visit. If you or they don't want the press involved, then tell your legislator that press is not allowed. If you agree to allow the press in, make sure your legislator's office understands this tour is an opportunity to learn more about your organization and not a campaign opportunity. Assign a staffer to work with the legislator's communications office and the press. You'll also need to determine in advance what parts of the visit are off-limits. Also, make sure all proper procedures are followed to maintain patient privacy.
- **Notify your staff of the tour's date and time.** Make sure your employees are aware of the legislator's visit and the purpose for the visit — getting to know your organization, the great work you do in your community and the challenges you face as you go about this work.

Emphasize that this is not a political or campaign visit but a chance for your employees to spotlight the great work they do every day.

- **Set aside a place for the members of Congress and staff** to make a phone call or relax for five minutes before the tour begins. An empty office or conference room will suffice.
- **Set aside time for discussion.** Either at the end or the beginning of the tour, set aside some time for you and possibly other key hospital staff to sit down with the legislator to discuss any critical issues and answer any questions they might have.
- **Send follow-up letters.** Send a letter thanking the legislator and staff for making the visit and reinforcing the points you made during the tour.

A note about timing. Legislators are eager to meet with their constituents during congressional recesses. Recesses generally occur the weeks before or after a major federal holiday and in the month of August. Check www.congress.gov for the latest congressional calendars. A standing invitation to tour your facility in August or during other congressional recesses will increase the likelihood of the legislator accepting the invitation.

Nurturing the Relationship

A strong relationship needs to be nurtured, and maintaining a dialogue is essential. Now that you've met your legislator and key staff members, continue to reach out to them on a regular basis on various issues throughout the year. Because legislators rely on input from constituents to inform their opinions on legislation and policy, you can become a valuable resource to them.

Because nearly every minute of a legislator's day is scheduled, from breakfast briefings to evening events, it may be difficult to reach members and staff by phone. Also, for security measures, all mail sent to Capitol Hill via USPS, FedEx or UPS is delivered to an off-site facility for processing — a process that may delay delivery for days or even weeks. For that reason, email is typically the preferred form of communication. Confirm with your legislators and their staff how they prefer to communicate.

The keys to writing an effective email are simple:

- **Personalize the message as much as possible.** Remind the legislator or staff member of your most recent meeting, visit to their office or phone call. Also, include the name of your organization, its location(s), the total number of people employed, and/or the total number of patients who receive care. Personalization may mean your message is given closer attention.
- **Get straight to the point.** Explain who you are and why you are writing. Ask for your email to be directed to the legislative staff person who handles health care.
- **Share your personal experience.** Use real-life examples to illustrate your points.
- **Limit any formatting.** Be sure to format the email as simply as possible because most are read on mobile devices. Do not include extraneous graphics or signatures.

A note about social media. Nearly all members of Congress have social media accounts, such as Facebook and X. You can connect with Congress online to see what issues are most important to them.

Reaching Out by Phone

From time to time, when urgent matters arise, such as a pending vote in the House or Senate, you may need to make a phone call. Here are a few tips:

- **Do your homework.** Make sure you have your facts straight and your talking points ready. You may only have a few minutes to get your point across.
- **Get straight to the point.** Explain who you are and why you are calling. Ask to speak to the legislative assistant who handles health care.
- **Be ready to answer questions.** Don't expect a one-sided conversation. Anticipate questions the legislator or staff could ask and have answers. If you're asked a question and you don't know the answer, say you will get the answer as soon as possible and follow up with them.
- **Follow-up with an email referencing your conversation.** Reiterate your talking points and provide any additional information you promised them.

Who's Who in a Legislator's Office



Commonly used titles and job functions of congressional staff:

- The **chief of staff** handles the overall office operations, including the assignment of work and the supervision of staff. The chief of staff reports directly to the senator or representative and usually is responsible for evaluating the political implications of various legislative proposals and constituent requests.
- In most Congressional offices there are several **legislative assistants** with expertise in specific policy areas. Depending on the committee assignments and interests of the member, an office may have a different legislative assistant for health care, the environment, foreign relations and tax policy.
- The **legislative correspondent** manages the flow of letters and emails. They draft responses and flag items of note for the legislator's attention.
- The **legislative director** monitors the legislative schedule in committee and on the floor and makes recommendations to the legislator on positions and votes. In some offices, the legislative director supervises the legislative assistants.
- The **communications director or press secretary** manages the legislator's relationship with the media and the public. They are expected to know the benefits, demands and special requirements of print, electronic and social media, and how to most effectively promote the member's views or positions on specific issues. Many press secretaries double as speech writers.
- The **scheduler** is usually responsible for allocating a legislator's time among the many demands that arise from congressional responsibilities, constituent requests and political activities. The scheduler also may handle travel arrangements and speaking requests.
- The **executive assistant/office manager** often handles scheduling as well as the day-to-day management of the office.



A note about district staff. A legislator also maintains staff in the district or state office. It is a good idea to get to know these staffers, given that they may be more familiar with your organization and its role in the local community. The district staff director is the legislator's main point person back home, keeps the the legislator informed about the local community and can help move along meeting requests and other information you may wish to convey. The district office staff organizes town hall meetings that may provide you and your employees the opportunity to weigh in on issues of importance.

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Majority Whip: Tom Emmer, R-Minn.
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