Robert Wood Johnson Foundation

Connect
Resource Manual

Helping Foundation grantees and partners build relationships with policymakers in Washington, D.C., and across the country.

Table of Contents

ABOUT THIS RESOURCE MANUAL

In this guide, we aim to provide an easy-to-use road map for building new relationships or nurturing existing ones with your members of Congress and their staff. Most of all, we hope you refer to it often as you strengthen the relationships you began as part of **Connect** and use the skills you've learned to reach out to other policymakers and stakeholders, such as potential funders, board members and other community leaders.

This manual was created specifically for participants in RWJF's **Connect** project and is primarily intended to be used in conjunction with the training offered by RWJF's **Connect** team.

"We have this remarkable privilege as Americans to be able to go to our elected officials and have conversations about who we are, what we do, and why it's so important, and that is such an extraordinary thing that I'm awed every time I have the privilege of coming here."

Polly Seitze, director
Robert Wood Johnson Foundation
Local Funding Partnerships
New Jersey

The Connect Project

THE CONNECT PROJECT

Connect, a project of the Robert Wood Johnson Foundation (RWJF), helps selected participants build or enhance relationships with their members of Congress and other policymakers–relationships that will serve to further their work in nonlegislative ways and position them as resources to policymakers on the most pressing health and health care issues in America today.

Our grantees and partners are talented, passionately committed people whose extraordinary work leads to sound solutions that improve the quality of life for people living in a state or district. The **Connect** project highlights this important work with members of Congress and other policymakers. Through **Connect**, participants have an opportunity to discuss the challenges they face and share the lessons they've learned with their representatives in government. **Connect** also provides the tools and resources to turn those opportunities into lasting, beneficial relationships.

Building relationships with policymakers can be a strategic goal for anyone working to bring about social change. There are tangible benefits for both participants and policymakers. **Connect** participants can educate members of Congress and other officials about the health and health care challenges facing people in their state or district and show how local institutions and constituents tackle those problems and find solutions. They can engage policymakers as respected voices of support in the community, gain increased media attention for their work and goals, and ask for help in navigating specific, nonlegislative barriers and challenges. These interactions will often spur fruitful relationships with other community leaders as well. Your **Connect** meetings are an important first step–or, for some of you, a next step–in a relationship-building process. But to turn a single meeting into a lasting relationship, you need a plan for further engaging policymakers and establishing an increased level of trust and credibility.

Connect brings policymakers in contact with a constituency too rarely heard from–those who are working on the front lines to address important health and health care issues such as improving health care quality, reversing the epidemic of childhood obesity, building the health care workforce, ensuring that all Americans have health care coverage, improving the public health infrastructure and reducing harm from tobacco, alcohol and other drugs.

Connect is one of only a few efforts under way in the philanthropic world to educate policymakers about the important work on critical health issues in communities throughout the nation. To date, hundreds of RWJF grantees and partners have learned how to reach out to their members of Congress and engage them as champions of their work. This approach has also been used effectively at the state and local level to engage other policymakers and officials.

No lobbying takes place as part of **Connect** activities. Like all private foundations, RWJF is prohibited from lobbying or otherwise attempting to influence legislation, and its funds are similarly restricted. RWJF prohibits the use of grant funds for either lobbying or political campaign activities. Other organizations interested in implementing a **Connect**-style program should be familiar with lobbying and political campaign restrictions.

ABOUT THE ROBERT WOOD JOHNSON FOUNDATION

The Robert Wood Johnson Foundation focuses on the pressing health and health care issues facing our country. As the nation's largest philanthropy devoted exclusively to health and health care, the Foundation works with a diverse group of organizations and individuals to identify solutions and achieve comprehensive, measurable and timely change. For over 40 years, the Foundation has brought experience, commitment and a rigorous, balanced approach to the problems that affect the health and health care of those it serves. When it comes to helping Americans lead healthier lives and get the care they need, the Foundation expects to make a difference in your lifetime. For more information, visit *www.rwjf.org*. Follow the Foundation on Twitter *www.rwjf.org/twitter* or Facebook *www.rwjf.org/facebook.*

The Connect Approach

THE **CONNECT** APPROACH

The Robert Wood Johnson Foundation's **Connect** project has helped our grantees and partners prepare for more than 1,500 meetings with their policymakers. Over the years we've learned a lot from these meetings and have fine-tuned our approach in response to new challenges and opportunities and, most importantly, by listening to suggestions from participants like you.

We have developed a model of preparation and strategy that is simple and straightforward. It will help to ensure that your meetings with your members of Congress and other policymakers are productive and effective. The preparation process for meetings with policymakers consists of a series of interactive group learning calls (or webinars) and two or more calls with a coach who will work with you throughout the process. The group learning calls and webinars provide an overview of the **Connect** approach, and the calls with your coaches focus on your individual strategy for your policymaker meetings.

It is our hope that your conversations, whether at a first-time meeting or continuing an established relationship, will engage your policymakers as enthusiastic champions of your work.

THE CONNECT APPROACH HAS FIVE ELEMENTS:

1. **Know Your Policymakers:** Research your policymakers' interests–and find the link between what they care about and your work.

2. **Introduction:** Draw them in with a concise and compelling description of how your work creates change.

3. **Story:** Share a story about how your work has improved the lives of people in your community.

4. **Ask:** An actionable request made to your policymaker that can advance your work and anchor your relationship.

5. **Follow-up:** The success or failure of your meeting is determined almost entirely by what you do after the meeting. By completing follow-up actions quickly, you'll nurture the connection, gain your member's confidence in your commitment to making positive change and lay the groundwork for a mutually beneficial relationship.

Staying on the Right Side of Relationship-Building: Avoiding Legal Pitfalls

Connect is an effort by the Robert Wood Johnson Foundation (RWJF) to help participants establish and strengthen relationships with their members of Congress and other policymakers. As a private foundation, RWJF is subject to certain legal restrictions that do not apply to other kinds of organizations—including some of our grantees and partners. Because your Connect meetings are supported by RWJF, you need to follow the rules that apply to us. This should not, however, impede your ability to tell policymakers about your work and the impact you are having in your community and your state.

To be more specific, when you're visiting with a legislator or their staff person, you can talk about your organization's work, even as it relates to health policy. You can describe the challenges you face, your successes and the impediments to greater success. **What you *cannot* do is discuss or answer questions about any specific legislative proposals at all or pending legislation.** The purpose of Connect is to help Congress understand what you do, not to lobby for or against legislation—including funding legislation like appropriations and "earmarks."

SO, WHAT DO I DO WHEN LEGISLATIVE ISSUES COME UP DURING MY MEETINGS?

SOME MEMBERS OF CONGRESS AND HILL STAFF MAY NOT BE FULLY AWARE OF THE LOBBYING RESTRICTIONS FACING PRIVATE FOUNDATIONS AND NONPROFITS.

They may ask you questions about a bill they're working on. If that happens, you can explain very openly that your visit is sponsored by the Robert Wood Johnson Foundation, which is prohibited from lobbying or expressing views on pending legislation, and that, instead, you are here to talk about your work and what it's doing for the member's constituents. In general, members and staff respond very positively when they learn that you are not asking for legislative action.

BE PROACTIVE TO PREEMPT A QUESTION OR AVOID CONFUSION.

If you or your organization is already working with a member of Congress on a legislative request with non-RWJF funding, you should acknowledge this at the start of the meeting and thank them for their support. Then, openly and briefly explain that, because this meeting is sponsored by RWJF, you can't discuss that topic today.

YOU CAN REFER A REQUEST.

If you receive a question from a member of Congress or staff person that relates to a legislative matter, you can let them know that you will refer the question to an appropriate person back home that will be able to respond to them promptly.

YOU CAN DISCUSS WHERE YOU GET YOUR FUNDING.

If you receive federal funding, you are able to mention that fact in the context of how your work is funded. However, you cannot reflect a view on this funding or ask that this funding stream be continued or increased, as that would require legislative action, and constitute lobbying for the purpose of this visit.

An RWJF representative will be with you to help navigate any lobbying-related issues at your meetings.

A WORD ABOUT POLITICAL CAMPAIGNS.

Finally, although these visits are designed to help your member of Congress understand your organization's work, talk may sometimes turn to campaigns. Please remember that no charity that is tax-exempt under Section 501(c)(3) of the Internal Revenue Code may participate or intervene in any political campaign on behalf of–or in opposition to–any candidate for public office. This means that if you are employed by a tax-exempt charity, your organization cannot endorse any candidates, make donations to their campaigns, engage in fund-raising, distribute statements or become involved in any other activities that may be beneficial or detrimental to any candidate, nor may you use any RWJF funds, resources or program names in such work. This is particularly important to remember when you are planning events that involve your member of Congress during the election season.

REMEMBER: Having a nonpartisan motive does not keep activities from being a prohibited campaign intervention.

"I was really surprised at how much fun it was. What was really surprising to me was how interested everyone was in what we were doing. Before we could even get in our ask, they said, 'What do you want from us?' and so when we asked to have the senator come and speak at one of our graduations, that was easy."

Margaret Tumulty, project director
Reclaiming Futures Seattle-King County, Washington

Decide Who to Meet With in Washington, D.C.

Choosing which members of Congress to meet with begins with researching your delegation. Finding out who your representatives are, learning about their interests and then identifying links between those interests and your work are important first steps in planning the strategy for a successful meeting. (The tip sheet on page 6 suggests resources for researching your members' interests.)

Your coach will work with you to identify three to five congressional offices for your team to meet with in Washington, D.C.

Typically, these meetings will be with your two senators and the representatives for the district(s) that your work most directly affects. Sometimes, it may be strategic to meet with members of Congress who represent district(s) your work does not currently serve. For instance, you may have plans to expand into their district, or it may be valuable to meet with members who have a personal or professional background, committee assignment or leadership role that is relevant for your work. However, meetings tend to be much more effective when you can demonstrate that your work is directly linked to real benefits to constituents in the district or state the member of Congress represents.

For strategic reasons, you may prefer to meet with only one or neither of your senators and instead focus on representatives in districts your work serves. Again, your coach will help you choose meetings with members best able to further the goals of your work.

Once you have selected your members, **Connect** will provide you with detailed biographies of each member to help you continue to research their interests and identify ways to engage their offices in your work.

You can find out the congressional district(s) in which you do your work at *www.house.gov/writerep/*. This site allows you to search by ZIP code and street address to identify your representative.

How to Learn About Your Congressional Delegation

WHAT TO KNOW	WHERE TO FIND OUT
WHO YOUR MEMBERS OF CONGRESS ARE	> You can identify your representatives in Congress by visiting *www.house.gov/writerep/*.
LEGISLATIVE INTERESTS AND PASSIONS Most members of Congress seek elected office because they care about something—a specific issue, a region of the country or even something from their career history. Knowing these interests can help you tailor your requests and find common ground for building a relationship. Start with a member's own website to see how they describe their interests.	> Check the House and Senate websites at *www.house.gov* and *www.senate.gov* to link directly to members' Web pages. > Check the Thomas site at *http://thomas.loc.gov/* to find bills introduced or cosponsored by your representative or senators. The Thomas site is a congressionally mandated online service providing access to information about federal legislation, congressional calendars, presidential nominations and other resources. > Sign up for newsletters or social media feeds for relevant members.
VOTING HISTORY If you want to know how your member of Congress voted on a specific piece of legislation, you can search by bill number, name or subject and then look for your member's name in the "roll-call vote."	> Go to the Thomas site at *http://thomas.loc.gov/*, then search for the bill or resolution. If there has already been a vote, you will find a link to "roll" under Major Congressional Actions. Click on the link and look for your member's vote. If the Major Congressional Actions link is not live, there hasn't yet been a vote on this item.
COMMITTEE ASSIGNMENTS The committees that members of Congress are assigned to are a measure of their interest in a particular topic, as well as their ability to supply support and advice in those policy areas. A member's committee service can also be an indication of how educated that member's staff is likely to be about your issue.	> Find House committee assignments on the House Clerk page at *http://clerkweb.house.gov*. > For information on Senate assignments, check under the Committees link at *www.senate.gov*.
PARTY AFFILIATION Although you should always work with both parties, knowing an elected official's party affiliation may give you a sense of his or her perspective on the world.	> Party affiliations are available on the House Clerk page at *http://clerkweb.house.gov*. For the Senate, check the main page at *www.senate.gov*.
PERSONAL INTERESTS Often, a member's personal interests or background can be as helpful to you as their professional interests.	> Scan members' bios for hobbies, memberships and other background that may help you establish a connection. Go to their events. Many members of Congress host "town hall" meetings throughout their states and districts. These provide an opportunity to introduce yourself and learn firsthand about their interests. Also, check local papers and websites and talk to other people in the community who know your members well.

Research Your Members of Congress: Finding the Link to Your Work

What are your member's name, party, and district?	
Why are you targeting this member? (e.g., We operate in her district *or* we want to expand in her district.)	
What are your member's relevant legislative interests? (e.g., votes, committee assignments, bills sponsored or cosponsored)	
What are your member's personal interests and background? (e.g., former school teacher; avid biker)	
Does your member have any affiliations? (e.g., member of caucus focused on your issue; award from a relevant outside group)	
Has your member had any recent news coverage?	
Are there any other connections you can consider? (e.g., attended fund-raiser; son is on our school board)	

Research Notes

"In our first meeting, David was following the Anatomy of a Successful Meeting. He took a deep breath, and there was a long pause, and he told the story… and that was where the congressman's aide moved up, and started to ask questions, and it really was testimony, I think, to humanizing the people that we are working for, humanizing the issues that they deal with every day, and clarifying what people in power… can do to make lives better for these people."

Katie Humphreys, senior vice president
St. Vincent Health System, Indiana (Covering Kids & Families)

Anatomy of a Successful Meeting

Policymaker meetings happen in a variety of settings, and can vary widely in duration. The **Connect** approach is built around a framework that provides a foundation for an effective meeting. While it's not intended to be a script, keeping this meeting framework in mind can ensure that you will deliver all your most important messages, whether you're having a rushed five-minute meeting in a hallway or a 45-minute discussion around a conference table.

1. START YOUR MEETING RIGHT.

A Foundation representative will start the meeting by describing some of the Foundation's work on the issue and our relationship with you and your work. That person will then hand the meeting over to you. Be sure to thank the staff person or member of Congress for their time. This would also be a good time to extend thanks for any work the member may have done on your issue.

2. AN INTRODUCTION THAT DESCRIBES WHO YOU ARE AND WHAT YOU DO.

Describe your work and its purpose concisely. Describe the people your work helps, both demographically and geographically. Summarize the purpose of your visit. You do not have to describe your request at this point, but signal that you have one. Remember, they *expect* you to ask for something, so be comfortable being upfront about it. *See page 11 for more information on introducing yourself and your work.*

3. A STORY ABOUT WHY YOUR WORK MATTERS.

Tell a brief story about a person that demonstrates your work and how it's improving the lives of people in the policymaker's community or state. Keep the story clear, positive and on point. Provide a few details about the person (e.g., neighborhood, age). Make it clear that the story is about a constituent. *See page 16 for more information on storytelling.*

4. AN ASK THAT CAN ADVANCE YOUR WORK.

Know what you want from the meeting. Be prepared to describe your ask clearly and concisely. After you make your ask, give the policymaker or staff person time to respond. *See page 19 for more information on making an ask.*

5. A PLAN FOR FOLLOW-UP.

Identify next steps, who is responsible for each and when these will be completed. Thank the policymaker and/or staff person for their time and give them your one-pager. Ask them for their cards if they haven't already given you one. At the end of the meeting, the Foundation representative will also provide materials on RWJF to the staff person and identify next steps if others have not already done so.

Quick Tips for Meeting With Policymakers and Their Staff in Washington, D.C.

Meeting with your policymakers and their staff can be much easier if you know what to expect. Here are a few simple tips and suggestions:

ARRIVE ON TIME.

Don’t be late. Don’t arrive more than a few minutes early. Reception areas are typically cramped quarters and can’t accommodate many people. They are often used as meeting spaces. If you do arrive early, check in with the receptionist and offer to wait in the hall.

BE FLEXIBLE.

Congressional schedules are notoriously fickle. Your visit may be canceled or run late, or you may end up meeting with another staff member than the one you were expecting. The duration of the meeting can vary as well. Some people will have only a few minutes to listen. Others may spend 20 minutes or an hour discussing your activities. And you never know when a meeting with a staff person will end up with the member walking by and deciding to sit in.

IF YOU ARE RUNNING LATE FOR A MEETING, MAKE SURE TO CALL AHEAD AND LET THE SCHEDULER OR STAFF PERSON KNOW.

Meetings are often scheduled back-to-back, so if you are late, your meeting time may be changed or it may be canceled altogether. Calling in advance allows the best chance for accommodation.

BE PREPARED TO MEET ON THE MOVE.

Occasionally, a member of Congress or their staff may ask you to walk with them to a vote or a committee meeting that comes up during your scheduled meeting time. Or, the office may not have enough space for you to sit down, so you may have to stand in the hallway or walk down to the cafeteria.

ALWAYS BE READY WITH YOUR ASK.

You never know when you might run into your member of Congress in the cafeteria or walking down the hall. The member could also pop in while you’re meeting with his or her staff person. Be prepared with a quick description of your work and an ask, just in case!

AND RELAX!

Your representative and senators (and their staffs) are as eager as you are to make a favorable impression and to have a cordial visit. It is very unlikely that you will be put on the spot or asked unfriendly questions.

A Compelling Introduction

Conveying clearly and concisely who you are and what you do is an important part of every meeting. A compelling introduction captures your audience's attention and keeps them wanting more. Think through a good, tight description of your work that takes no more than three minutes to deliver—and be ready to boil that down to a 30-second introduction for those quick hallway meetings.

SO, HOW CAN YOU INTRODUCE YOURSELF AND YOUR WORK IN A WAY THAT WILL RESONATE WITH POLICYMAKERS?

START STRONG AND BE ENTHUSIASTIC.

Use your first sentence to create excitement about your work rather than listing your positions and credentials.

> *"I'm here to tell you about our organization and how it is helping your constituents get something they've never had before."*

FORESHADOW YOUR ASK.

Policymakers and their staff always want to hear how they can help.

> *"… And we're here to tell you exactly how we're achieving these results and talk with you about specific ways your office can help."*

LOCALIZE.

Focus on a single point about your work instead of covering too much, and make it relevant to their interests. And remember, policymakers understand national issues through a local lens, so highlight the impact of the problem or the value of your solution for constituents.

> *"In Michigan, we've got the third highest obesity rate in the country, and our work to help seniors become more physically active is crucial."*

HUMANIZE.

Include names of people and places as you describe your work. If you serve a particular community or neighborhood, name it. Your audience will appreciate the ties with their home state and start to visualize it, and that makes your description more memorable.

> *"Margaret, who lives on the south side of the city in Walker Park, now walks every day and has lost 30 pounds."*

FOCUS ON WHY IT MATTERS, NOT WHAT IT IS.

Mention a specific result that shows your success. This is not the time to describe how your program functions, but rather to highlight a specific outcome of your work. A group trying to address overcrowding in emergency rooms used this in their introduction:

> *"We've found that by storing a frequently used shot in the emergency room, rather than the pharmacy, we are able to reduce patient wait times by 30 minutes."*

PERSONALIZE.

Policymakers' own experiences shape the way they see issues. Linking your work with a policymaker's personal interests or prior professional background is a great way to make a connection.

> *"As a long-serving public school teacher, you know how important dependable, quality health care is for a child's success in school."*

Working a short and compelling example like this into your introduction will pique your listener's interest to hear more about your work.

Having a compelling introduction will start your meetings with an engaged audience, but it's just a beginning to a successful meeting. Be prepared to expand upon the key points you raised in your introduction as your meeting progresses.

Talk About Yourself and Your Work

AS YOU THINK THROUGH YOUR INTRODUCTION, ASK YOURSELF THESE QUESTIONS:

1. How many constituents do you help or work with?
2. In which towns or counties of the policymaker's district or state do you work?
3. What challenges or problems does your community face and how are you addressing them?
4. What will you say in your introduction to create excitement about your work and how it is improving the lives of your policymaker's constituents?
5. How will you briefly highlight the demographics of the health issue(s) you face in your state?
6. Whether your focus is obesity, drug abuse or the uninsured, what does the problem look like in your community?
7. What single success can you include in your introduction that might pique your listeners' interest in hearing more about your work?
8. What other recent successes demonstrate your effectiveness?
9. In what ways do your policymaker's interests intersect with your own? (Refer to the worksheet, Research Your Members of Congress, on page 7.)
10. How is life now different for the people your project helps?

A FEW DOS AND DON'TS

DOS	DON'TS
Repetition is key. If you want someone to remember your name, find ways to repeat it. If you want them to remember the name of your program, repeat that, too.	**Don't use acronyms** of any kind unless they are universally understood (like the EPA). Anything else should be said in full—even if you've already spelled it out. Use Robert Wood Johnson Foundation, not RWJF, each time.
Make good eye contact and keep your body language open. Crossing your arms or looking away will diminish the impact of your introduction.	**No jargon.** Jargon only works for insiders talking to insiders. Test yourself for jargon by trying out your description on people who are unfamiliar with what you do.
	Don't overload the introduction with statistics that may be important but when strung together tend to sound like a math problem no one wants to solve. You will have a chance to share more statistics and facts later in your meeting; even then, use them sparingly.
	Don't include your résumé. Tell them instead how your work helps people—"I'm a pediatrician who is helping kids in Utah get the care they need." It may seem simplistic, but it will resonate with your audience.

Recognize and Avoid Jargon

Jargon can be great … if you're speaking to a group of specialists in your field and need to convey complex ideas succinctly. However, policymakers are generalists, and they won't get a clear idea of what you do if you use jargon. Beware of euphemisms or needlessly frilly language (like using "assist" when you really just mean "help," or "provide" instead of "give," or "persons" rather than "people") and well-known words or phrases that are empty of meaning because they are overused (like "implemented tailored strategies," "intensive," "linkage" or "mechanisms").

Beware also of words that are meaningful, even exciting, to people in your field but might sound dry and clinical when you're talking to those who are unfamiliar with your activities. For example, one group of **Connect** participants were doing amazing work to get kids recovering from a drug or alcohol addiction involved in their communities by connecting them with adult mentors, jobs, the local art and music scene and volunteer projects. Unfortunately, when the group described these exciting, concrete accomplishments as, "Youth are involved in increased *pro-social activities*," the impact of their work was lost.

SO, HOW CAN YOU ELIMINATE JARGON IN YOUR MEETINGS WITH POLICYMAKERS?

CONJURE UP YOUR AUDIENCE.

Envision one typical reader or listener–a friend who is not in your field of work, for instance–and prepare as if you were sending a letter to that person. If your friend wouldn't understand a term or phrase, don't use it. Better still, ask yourself how your nonspecialist friend *would* describe the same idea, and borrow the language, in a sense, from him or her.

USE CONCRETE DETAILS AND EXAMPLES.

The work you do is important and meaningful–and is changing the lives of people in your community for the better. Take the time to include a few colorful details of exactly how your work is achieving its successes. Instead of abstract expressions that encompass everything you do, give one or two concrete illustrations that explain who is doing what, for whom, with what benefit. Using everyday language to describe the impact of your work is very effective and often results in the listener staying more engaged. Use concrete details in place of jargon or "summary" language. Instead of,

> *"incentive-based rewards are used"*
> say,
> *"teens who finish the training get gifts of new sneakers and movie tickets at a community recognition dinner."*

Details are memorable, and often carry an emotional punch that will help connect the representative or their staff person to your work in a lasting way.

"Jargon: The specialized or technical language of a trade, profession, or similar group; speech or writing having unusual or pretentious vocabulary, convoluted phrasing, and vague meaning; a lethal combination of the dense and the tedious."* Tony Proscio.

* For more details on avoiding jargon, read Tony Proscio's ***In Other Words: A Plea for Plain Speaking in Foundations,*** available at *www.emcf.org/fileadmin/user/PDF/Other_Resources/jargon_inotherwords.pdf*

DON'T BE AFRAID OF EXPRESSING PASSION

You are passionate about your work in tackling the important issues of health and health care that face Americans today. Use that energy and enthusiasm to guide your choice of words when speaking to people who are not familiar with what you do.

DON'T RELY SOLELY ON SUMMARY LANGUAGE

It is easy to use and overuse summary phrases, such as,

"we implement program enhancements and system improvements,"
or,
"we create tailored strategies that increase retention."

Summary statements are fine if you follow them with effective concrete details and examples. Used too often, they become vague and meaningless.

PRACTICE WRITING DOWN DESCRIPTIONS OF THE WORK YOU DO AND READING THEM ALOUD

Listen to yourself. Hearing long, convoluted sentences and dense phrases spoken out loud can be revealing. The benefit of *hearing*, rather than just reading silently, is that it gives you an opportunity to ask, "Would anyone really say that?" When the answer is no–and it often is–then the odds are good that a rewrite is in order.

Which of the following statements sounds most likely to capture someone's interest and leave him or her wanting to know more about your work?

"Our case managers are trained social service professionals able to offer supportive counseling and personal advocacy and address the psychosocial issues unique to the individual with cancer."
or,
"Our staff members meet with cancer patients to assess their emotional state of mind, help them understand their disease and explore their treatment options."

REMIND YOURSELF: MEETING WITH YOUR MEMBER OF CONGRESS IS *NOT* A JOURNAL ARTICLE

Remember, policymakers are generalists. Use common (though detailed and passionate) language to describe your work and the challenges you face. You won't sound any less knowledgeable, and you'll be more easily understood.

Remember, policymakers are generalists. Use common (though detailed and passionate) language to describe your work and the challenges you face. You won't sound any less expert, and you'll be more easily understood.

Make Your Own Jargon List

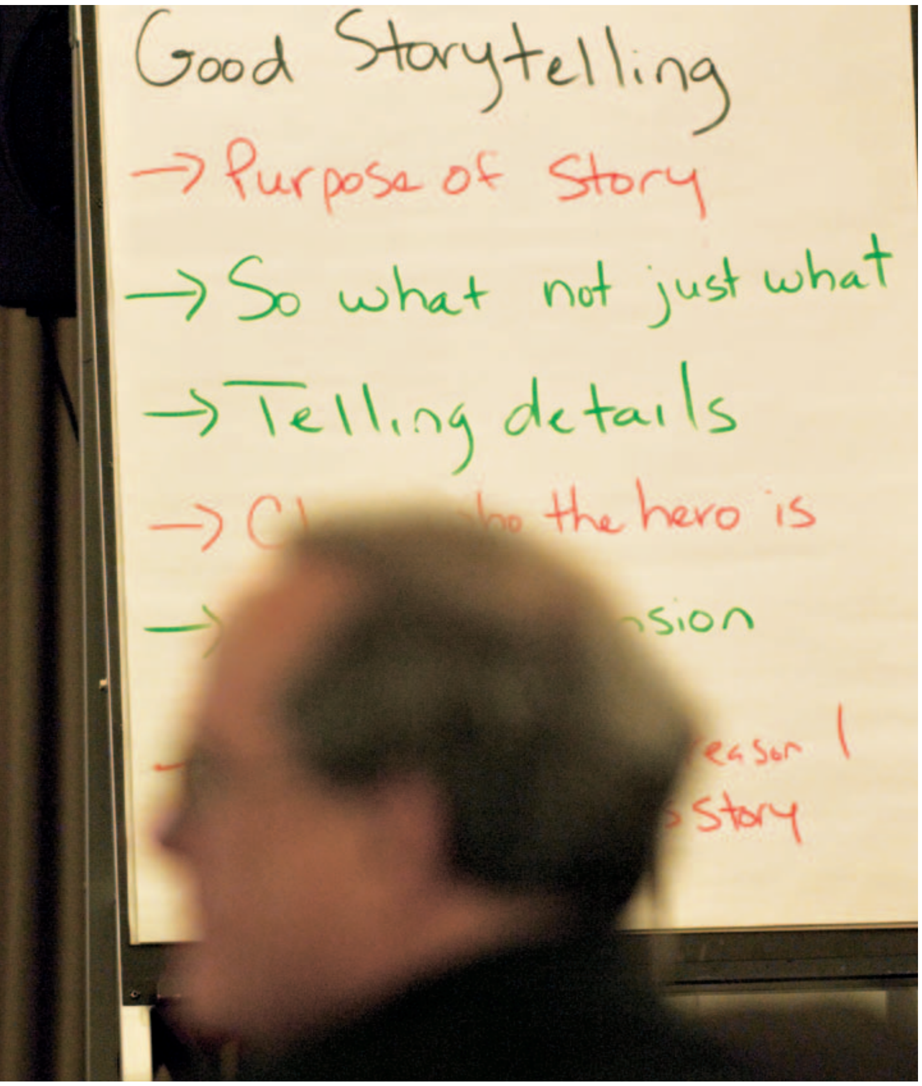
Start a list of the buzz phrases you hear others overusing. The fact that these phrases annoy you should be reason enough to avoid them yourself. Yet, you may be surprised (and humbled) to discover that you do not, in fact, always avoid them.

Here are a few examples of jargon and their translations. Please make your own list!

JARGON	TRANSLATION
utilize	> use
cohort	> group
technical assistance	> expert advice
mechanisms	> methods *or* ways
efficacious	> it works
youth	> kids *or* young people
evidence-based	> proven to work
health care delivery system	> hospitals, clinics and other ways people get health care
APRN	> Advance Practice Registered Nurse
individuals	> Pennsylvanians, our neighbors, people, etc.
chronic health conditions	> persistent conditions like diabetes or high blood pressure
social determinants of health	> where you live, learn and work that affect your health
bending the cost curve	> making care more affordable; controlling rising costs

Strategic Storytelling

A well-developed, purposeful story is an effective and compelling way to emotionally connect policymakers to your work and help them understand how your work improves the lives of their constituents. A good story can transform a polite listener into an engaged champion of your work.



WHY TELL A STORY TO YOUR POLICYMAKER?

Representative Rush Holt (D-N.J.) has compared being an elected official to "being a television set on whom someone else [is] changing the channel every 10 minutes." A compelling story can break through the information clutter that policymakers have to swim through every day.

When possible, use your story to underscore the importance of your ask. For example, if you're inviting the policymaker to host a volunteer recognition event, make sure your story underscores the invaluable role volunteers play in helping you succeed.

SO, WHAT ARE SOME WAYS TO MAKE SURE YOUR STORY RESONATES WITH POLICYMAKERS?

BE PURPOSEFUL.

Use your story to illustrate a key point about your work–a success, a challenge, a unique way your work addresses the issue at hand. Craft your story in a way that gives policymakers a better understanding of a *specific* problem facing the communities they represent and how your work improves the lives of people in those communities. A well-told story will set up your ask by illustrating a specific problem that the policymaker or their staff member can address by agreeing to your ask. To make sure your story's purpose comes through, end your story with "I tell you this story because…" or "The reason I share this story is to highlight the need for…" And then make your ask.

BE STRATEGIC.

Whenever possible, link your stories to the policymakers' interests and to your ask. If your representative is on the Veterans' Affairs Committee, you can pique his or her interest by telling a story about a veteran whom your work has helped.

Different types of stories offers advantages for distinct situations:

- **How We Got Started:** This is about your organization's or your work's beginnings, often focusing on one of your founders at the time your work began. This story can help establish credibility and build trust when you are beginning a relationship with a policymaker or their staff.

- **Why I Do What I Do:** This story is told in the first person, illustrating the problem your work addresses and the value of the solution you offer. It can also help to build credibility when you are beginning a relationship with a policymaker or their staff.

- **Nature of Our Challenge:** This can help policymakers understand the problem your work addresses and why it is important to their constituents. It most often focuses on an individual who is struggling and does not always have a happy ending.

- **Lessons Learned:** This illustrates how your organization has grown stronger by learning from past failings. This story can show a policymaker that you are committed to constant improvement or underscore why it is important to get past misconceptions about the problem.

- **Symbol of Our Success:** This often focuses on a person your work helped or a staff member or volunteer who has made a difference. It must have a happy ending. This underscores the message that your work can make good things happen.

- **Vision:** This is set in the possible future where your mission has been accomplished. It can help a policymaker understand the potential for your work to make real change and why it is worthy of their support.

MAKE AN EMOTIONAL CONNECTION.

Use your story to help your audience establish an emotional connection to your work. Policymakers and their staff crave real stories about real constituents. The purpose is to help them identify with someone your work has helped.

FOCUS ON ONE PERSON OR FAMILY.

Tell a story about one real person. Listeners will be more invested in the outcome when work has helped a real person. Focusing on one person or family also helps keep your story a story, and not just another description of your work.

USE TELLING DETAIL.

Use nuggets of detail to make your story interesting and memorable. Simple details, like using and repeating the person's name and mentioning aspects of their life or neighborhood, help bring your story to life–and get your audience invested in the outcome.

Which of these examples leaves you wanting to hear more? "An elderly woman's grandson called our hotline because he heard we could help people like his grandmother. She lived alone in a rural setting and had trouble getting to doctor appointments." Or, "Mary Rose, an 84-year-old woman from Sergeantsville with 12 grandkids, used to tell her grandson James that if she couldn't get somewhere on her own, she didn't need to be there. James admired her independence, but he was worried about how many doctor appointments she was missing. She had diabetes, among other things. He called our hotline one day and…" And, although detail is crucial to a good story, use it sparingly and strategically. Only add specific details that will make your story memorable or bring out its purpose–listing all Mary Rose's medical conditions or describing each stage of her resistance to accepting help would not make for an engaging story.

DON'T "BLACK BOX" YOUR WORK.

This means keeping the process of how it works hidden. Instead of telling your audience, "Sheila came to us with no place to live and a drug and alcohol problem. She is now living on her own, free of drugs," say, "Sheila came to us and we connected her with a counselor in her neighborhood who called her each day before her treatment appointments and helped find her housing. She is now living on her own, free of drugs." Be specific about how your work makes a difference.

WHEN IT COMES TO ENGAGING POLICYMAKERS, A GOOD STORY IS A *TRUE* STORY THAT:

- Leads into your ask.
- Is brief.
- Is about one real person or family.
- Has a plot with a beginning defined by challenge, a middle where the challenge grows and an end where the challenge is resolved.
- Explains specifically how your work helped overcome that challenge.
- Relates to a larger problem facing the community.
- Refers to specific towns and cities in the district or state.
- Relates to the policymaker's own interests.
- Uses memorable details that describe the person, family or your work.
- Avoids jargon.

AS YOU WORK ON IDENTIFYING AND CRAFTING A STORY TO SHARE, ASK YOURSELF THESE QUESTIONS:

1. What did your representative do before being elected to office? What are his or her priorities (according to their own website and other sources)? What committees do they sit on? (Refer to the worksheet, *Research Your Members of Congress: Finding the Link to Your Work,* on page 7.)

2. How does your story appeal to the specific interests of your representative? What links to your member's interests can you include (e.g., if the member sits on the Committee on Veterans' Affairs, can your story feature a veteran)?

3. If you could leave your audience with one powerful memory about the work you do, what would that be?

4. Is your story focused on one person or family? What specific challenge did that person or family face?

5. Who is the hero of the story? Is it the person your work helped? Is it your organization?

6. What details give life to the story? Do you refer to the hero by name? Do you mention towns and cities by name?

7. Are there parts of the story that get bogged down with details without furthering your point? Your story can't convey all of the messages and nuances of your work. Could you leave some sections out, and, if so, which?

8. What specific action on the part of your policymaker does your story convey or suggest?

9. At the end of the story, how would you complete these sentences?

   "I tell you this story because…"

   or,

   "I tell you this story to make clear the need for…"

10. With a little practice, can you tell this story in two minutes or less?

Identify an Ask

WHY BUILD A RELATIONSHIP?

Meeting with your policymakers and their staffs is a valuable opportunity for you to educate them about the outstanding work you're doing in their state or district and to establish yourself as a knowledgeable resource. This permits them to come to you with a specific question about a health-related topic within your expertise, or for you to go to them with a problem or challenge they can help you solve. Members of Congress and other policymakers are influential people in your community and can be effective problem solvers for their constituents.

Your **Connect** meetings are an important first step–or, for some of you, a next step–in a relationship-building process. During your meeting, you may have a rushed five minutes with a policymaker or a 45-minute-long thoughtful discussion. In either scenario, you need a plan for further engaging them and establishing an increased level of trust and credibility. The best place to start is with a good ask.

WHAT IS AN "ASK"?

An ask is policy-speak for a specific request that you make of your policymaker during your meeting. Whether you're talking with a member in person or with a member of their staff, they will be waiting for you to make the ask. They expect it, and in some cases they will even prompt you (e.g., "So, what can we help you with today?"). Remember, policymakers and their staff are looking for ways to help constituents and will welcome an opportunity to do something specific to help further your important work.

Often, an ask focuses on creating an additional opportunity for educating your policymaker or their staff about your work. For example, you can ask them to visit and see your work firsthand. Other good asks might include: hosting an upcoming event with you; drafting a letter of support for a grant proposal; or helping you get a meeting with someone in the community whom you might not otherwise reach.

When you make your ask during your meeting, be sure to give the policymaker or staff person time to respond. Also, give them an opportunity to offer suggestions.

The bottom line–always be prepared with a good ask.

A GOOD ASK IS:

Actionable. It is a specific task that is within the power of your policymaker to accomplish.

Linked to their interests. Connect your ask to an issue that is important to your policymaker.

Advances your work. Although the ask is ultimately about building a relationship, this is also an opportunity to accomplish something positive.

REMEMBER–A good ask is *not* linked to specific legislation, which includes asking for appropriated or earmarked funding for your project. Those types of asks would constitute *lobbying* and are therefore off-limits for a Foundation-supported visit.

There are many asks you can make that will help you to advance your work and deepen your relationship with a policymaker. One surefire ask for relationship-building is to invite them to make a site visit to see your work firsthand, and better understand how what you're doing impacts their constituents. More information is included below on preparing for a great site visit. You can see a sampling of the asks **Connect** participants have made in the past on page 20, which also includes additional description of best practices. All example asks in this manual are meant to help you brainstorm, but don't feel you have to choose from the list. You should pursue the ask that you and your coach decide will be most beneficial to your work.

What Can I Ask of My Policymaker?

Here are some suggestions and examples of asks other **Connect** participants have made of their members of Congress or other policymakers. Remember, sometimes your request may relate directly to an immediate opportunity or problem you face. Other times, it may focus entirely on creating a new opportunity to connect a policymaker to your work and continue the relationship-building process. Here are just some examples of asks effectively made by past **Connect** participants, with notes on how each can advance your work:

If You Want To …	Consider Asking Them To …
Help the policymaker understand your work	• Visit and meet constituents affected by the problem or benefitting from your solution • Include a member of your team on their health issues advisory board
Validate your work for prospective partners or funders	• Write a letter on behalf of your organization, recognizing the importance of your work • Enter a statement in an official legislative record, like the Congressional Record
Make connections to potential partners, like a mayor, a business leader or a nonprofit executive director	• Write a letter of introduction to a specific community leader • Arrange a meeting with a specific community leader • Convene a forum with a group of community leaders
Educate other government policymakers about your work	• Write an informative letter to his or her colleagues • Arrange a meeting with or help you communicate with an agency official • Hold a roundtable for other policymakers and their staffs
Cut through the red tape	• Call or write a government agency on your behalf
Get funding	• Research available government agency grant funding that may be appropriate for your work • Write a letter to a government agency or a private philanthropy in support of your grant proposal
Get public attention	• Include an article about your work in their constituent newsletter, or write an article in yours • Write an op-ed about your issue or your work • Speak at a conference or other public event

For details on how to make your ask a reality, refer to the "Follow-through Is Everything" section on page 41.

A “site visit” is a surefire way to engage your policymaker in your work. It allows them to see firsthand the work that you are doing and connects them in an effective way by creating a visual image.

ASKING A POLICYMAKER TO SCHEDULE A SITE VISIT

WHAT’S A SITE VISIT?

A “site visit” gives a policymaker and/or their staff the opportunity to see your work firsthand by traveling to a facility or other location where your work–and the benefits it provides–is in full action. This can be your organization’s headquarters, a neighborhood clinic, a school or another location. Many site visits include a tour and give the policymaker a chance to meet the people who are making a difference and speak with the people who are benefiting from your programs.

WHAT’S THE VALUE OF ASKING A POLICYMAKER FOR A SITE VISIT?

Asking your policymaker to attend a site visit is one of the most effective ways to familiarize them with your work and show off your successes. It gives you the opportunity to get to know the policymaker better and build your relationship with them. A policymaker who has seen what you’re doing for themselves is more likely to champion your issue in the future. It also provides some great photo opportunities!

HOW DOES THE PROCESS WORK?

Policymakers receive many requests for site visits, but their ability to accept your invitation will depend on many factors, including the policymaker’s busy schedule. The first step is to settle on a date. It is important to have a date or a few dates in mind when you first approach the subject, but it’s also good to make sure the policymaker and their staff knows you can be flexible. If you’re inviting a legislator, it’s worth checking to see when the legislature is in session; recesses and weekends may be the easiest times to schedule a visit. As you work to determine a date, you should also develop an agenda for the visit and consider who else you will invite and how they will contribute to a successful visit. For more information on planning a site visit, please see page 46.

ASKING A POLICYMAKER TO WRITE AN OP-ED ON YOUR ISSUE

WHAT’S AN OP-ED?

Op-ed is an abbreviation for “opposite the editorial page” and can describe both the page itself and the opinion pieces that a newspaper publishes on the page facing the editorial page. Newspapers generally have a stable of op-ed columnists and regular contributors, but most also print op-eds written by outside authors. Editors may choose to balance their coverage of an issue by publishing op-eds that express opinions that differ from the ones found in its editorials. Op-eds may also be selected for their unique response or fresh perspective on a recent event or news story.

WHAT’S THE VALUE OF ASKING A POLICYMAKER TO WRITE AN OP-ED?

Asking your policymaker to write and submit an op-ed offers an excellent, high-impact opportunity for you to highlight your work and bring attention to a pressing health issue in the community. As is true of many asks, the process of working with the office staff to create an op-ed will ensure that they learn a lot about your efforts and your message.

WHEN SHOULD YOU ASK A POLICYMAKER TO WRITE AN OP-ED ON YOUR ISSUE?

Ask for an op-ed when you have a timely issue to bring to the public’s attention. How does it fit into current local or national debates? Find a “hook” on which to peg your issue–a recent national study on obesity, an announcement by the President of a new health priority, an event date or anniversary, or a continuing local or national news story. An op-ed from your policymaker could be particularly useful as you seek to build support or credibility within the community for a new project or fund-raising effort.

A word of caution: Even when an op-ed is signed by a policymaker, it’s often difficult to get one placed in a large city newspaper, especially those that are considered national outlets like the *New York Times* or the *Washington Post.* Consider targeting smaller papers in the policymaker’s district or state, where you will have a greater chance for a successful placement. Also, don’t be offended if the policymaker does not readily agree to your request. Policymakers, too, have to balance the number of times they approach a news outlet and on which topics.

ASKING FOR A CONGRESSIONAL RECORD STATEMENT

WHAT'S THE CONGRESSIONAL RECORD?

The Congressional Record is the published daily account of official proceedings and debate in the House and Senate chambers of the U.S. Congress.

WHAT'S THE VALUE OF ASKING FOR A CONGRESSIONAL RECORD STATEMENT?

Asking your senator or representative to submit a formal statement about your work to the Congressional Record is a great ask. A Congressional Record statement can:

- Ensure the office learns more about your work simply through the act of drafting, editing and formally submitting the statement.
- Increase the likelihood that the member, him or herself, will become increasingly familiar with your work through reading and approving the statement and, on occasion, through personally reading the statement on the House or Senate floor.
- Provide a public statement of support for your organization you can reprint in full, quote in brochures and newsletters, highlight on your website and refer to in speeches.

HOW DO I GO ABOUT ASKING FOR A CONGRESSIONAL RECORD STATEMENT?

You can ask for a Congressional Record statement in support of your work whether this is your first visit or you already have an established relationship with the member's office. This is an easy ask, meaning it does not require much work by the congressional office. A statement may be particularly useful to recognize a significant milestone for your work–a 20th anniversary, a grand opening, an award received. A timely statement also gives a member of Congress the opportunity to put a local face on a national issue.

HOW DOES THE PROCESS WORK?

If you choose to ask for a Congressional Record statement, most offices will ask you to provide them with background information and draft language to build from. You don't need to have this language prepared when you make the ask, but you should provide it as part of your follow-up. Once you submit a draft, the office will make revisions. The legislative assistant who specializes in your issue area is likely to be the person editing the statement and sharing it with the member for review and final approval. The statement is then formally submitted by the member and becomes part of the official record of the Congress.

WILL MY SENATOR OR REPRESENTATIVE READ THE STATEMENT ON THE HOUSE OR SENATE FLOOR?

Some statements are read but most are submitted directly to the Record. As the floor schedule is continually filled with debates and votes, with limited time for each member of Congress to speak on their priority issues, it may not always be possible for your member to read the statement aloud. The real goal is for the statement to become part of the official account of congressional proceedings and for the staff and your senator or representative to become better acquainted with the value of your work in the process.

HOW CAN I MAKE THE MOST OF THIS ASK?

A Congressional Record statement supporting your work can be a great marketing tool. Post it on your website, refer to it in funding support letters, mention it in speeches and give framed copies to your staff or volunteers. You can also ask the staff person who worked with you on the Congressional Record statement to send you an official copy signed by the member of Congress who submitted it.

WHAT ABOUT THE STATE AND LOCAL LEVEL?

Many state and local legislatures have similar daily diaries, and requesting a lawmaker's statement about your work can offer the same value as a Congressional Record statement. The process for requesting a state or local statement is broadly similar but, before preparing a draft, double-check with the policymaker or staff member to confirm that the legislature has an official written record and to understand the rules.

Identify an Ask

List the challenges and obstacles your program currently faces. What goals have not been met? What are the stumbling blocks to their achievement?	
Are there any groups you are having trouble reaching that your policymaker might help you engage? (Business leaders, partners, community segments, clients)	
List any upcoming events—celebrations, milestones, conferences, reports. Circle those that offer opportunities to involve your member of Congress.	
Are there specific, nonlegislative ways your member can help? (Support for a federal grant application, help with a regulatory issue, getting attention for an important community issue)	

Identify an Ask

LIST YOUR MEETINGS BELOW	LINK YOUR ASK TO THEIR INTERESTS	BRAINSTORM
	What are this policymaker's interests? (Refer to the *Research Your Members of Congress* worksheet on page 7)	Use the notes you made above to jot down ideas about how this particular policymaker might become a champion of your work and further your goals.
MEMBER		
MEMBER		
MEMBER		
MEMBER		
MEMBER		

NOTE: Eliminate any asks linked to specific legislation, which includes asking for an appropriation or an earmark for your project. Those types of asks would constitute lobbying and are therefore off-limits for an RWJF-sponsored visit.

	EASY ASKS (RELATIONSHIP-BUILDERS)	CONNECTING ASKS	SITE VISIT
	Are there any “easy” asks, like a letter of support or a Congressional Record statement, that would be appropriate for this member?	How can this member use his or her influence to connect you with others? (A particular group, a congressional committee, the media?)	Will you invite this member or a staffer for a site visit?

Sample Congressional Record Statement

FAITH IN ACTION

Mr. GRASSLEY. Mr. President, in the 21st century, advances in medicine are allowing Americans to live longer than ever before. Today, the average American will live to be over 76 years old. As the collective age of society increases, so does the need for increased help, care, and support, as long-term illnesses and the frailties of age become the rule, not the exception. Faith in Action volunteers play a crucial role in ensuring that help is there for neighbors in need.

Faith in Action is a nationwide, interfaith coalition that works to help people with long-term health needs or disabilities maintain their independence by providing assistance with daily activities. Funded by the Robert Wood Johnson Foundation, Faith in Action boasts 100,000 nationwide volunteers serving over 200,000 care recipients.

Through Faith in Action, Americans of every faith—including Catholics, Protestants, Hindus, Jews and Muslims—work together to improve the lives of their neighbors in need. Faith in Action volunteers help others maintain their independence by doing simple things: watering flowers, shopping for groceries, taking people to the doctor, and simply listening. Sometimes they open doors that people can't open on their own.

June 22, 2004 CONGRESSIONAL RECORD — SENATE **S7163**

Education: 1974–1978, City College of the City University of New York B.A. degree, cum laude.

1978–1981, University of Pennsylvania Law School, J.D. degree.

Bar Admittance: 1982, Pennsylvania.

Perry moved to Nevada, where he became a successful prosecutor in the Washoe County District Attorney's Office. After several years, he rose to the position of Deputy District Attorney for the Criminal Division.

In 1976, Mr. Perry joined the law firm of Laxalt and Berry, and a few years later he formed a partnership with Richard Davenport. He ventured out on his own in 1991, forming Robert H. Perry, Ltd., and concentrated on civil trial work.

Since then Mr. Perry has dedicated himself to representing average citizens who have been harmed by the wrongful actions of others. Many times the party that did the harm was much more powerful than the victim—but in our legal system, it is possible for ordinary people to get justice, thanks to lawyers like Mr. Perry.

In 2001, Mr. Perry represented a young girl whose medical treatment had been delayed because the treating physician thought she was complaining in order to receive more painkillers. But in fact, she was really sick. When surgery was finally performed on this girl, only three feet of her small intestine remained. Today, and for the rest of her life, she must receive her nourishment intravenously.

Mr. Perry fought for her and she won the largest verdict for medical malpractice in Nevada history.

This is just an example of the kind of battles that Robert Perry wages on behalf of his clients. I salute him for his selection as Trial Lawyer of the Year, and extend my best wishes for success in all his future ventures.

LOCAL LAW ENFORCEMENT ACT OF 2003

minds as well.

FAITH IN ACTION

Mr. GRASSLEY. Mr. President, in the 21st century, advances in medicine are allowing Americans to live longer than ever before. Today, the average American will live to be over 76 years old. As the collective age of society increases, so does the need for increased help, care, and support, as long-term illnesses and the frailties of age become the rule, not the exception. Faith in Action volunteers play a crucial role in ensuring that help is there for neighbors in need.

Faith in Action is a nationwide, interfaith coalition that works to help people with long-term health needs or disabilities maintain their independence by providing assistance with daily activities. Funded by the Robert Wood Johnson Foundation, Faith in Action boasts 100,000 nationwide volunteers serving over 200,000 care recipients.

Through Faith in Action, Americans of every faith—including Catholics, Protestants, Hindus, Jews and Muslims—work together to improve the lives of their neighbors in need. Faith in Action volunteers help others maintain their independence by doing simple things: watering flowers, shopping for groceries, taking people to the doctor, and simply listening. Sometimes they open doors that people can't open on their own.

In my home State of Iowa, over 2,100 dedicated volunteers work in local programs to contribute approximately 315,000 volunteer hours per year—a service valued at nearly $5.2 million.

But the value of Faith in Action is measured not by dollars and cents. Nor

in and out of their home with ease. Fred can now go to church, enjoy the sunshine, and watch his grandchildren play.

As an Iowan and a Member of Congress, I greatly appreciate the selfless acts of charity done by Faith in Action volunteers and I look forward to even greater accomplishments in the years to come.

THE CRISIS IN HAITI

Mr. DODD. Mr. President, I rise today to speak about the lamentable situation in Haiti. After suffering political upheaval and widespread violence over the last few months, the Haitian people are now facing even more desperate circumstances.

During the last 2 weeks of May, floods devastated major sections of Haiti and parts of the Dominican Republic. The death toll in Haiti has reached nearly 2,600 people not including the missing and medical personnel expect that number to climb higher as the waters recede and reclamation efforts become possible.

In the immediate aftermath of the catastrophe, aid workers, Haitian officials, and foreign troops—including U.S. soldiers scrambled to prevent the crisis from worsening. They have been delivering emergency supplies of food and water, building temporary housing, and working to prevent the spread of disease.

I am concerned, however, by reports that the efforts are sorely under-funded

What to Leave Behind at Your Meetings

Bring only the basics. Policymakers and their staffs are inundated with information in both paper and electronic form. They don't have time to shuffle through large amounts of paper or peruse 200-page reports. Leave them with the highlights, and let them come to you as their resource when they have questions or want additional documentation.

NOTE: If you've just released a report with significant implications for policy and want to be sure to get it in the hands of your representative or senator directly, provide a concise and separate summary of the key findings.

SO, WHAT SHOULD YOU LEAVE THEM WITH?

"One-Pager"–This is the be-all, end-all of leave-behind materials. When you meet with congressional staff, most will expect you to leave them with a one-page document that succinctly describes your work. After your meeting, this "one-pager" will be your link with staff and their immediate reference point about the work you do. (See *Prepare a One-Pager* on page 28 for more information.)

Site Visit Invitation–If your ask includes an invitation to a policymaker to visit your site, it makes sense to bring an actual invitation letter with you to your meeting when possible. If circumstances don't permit you to have the letter ready for delivery at the meeting, it is perfectly appropriate for you to make your ask and send the invitation letter as a follow-up step after you return home. And remember, site visits are a great ask and are often just as appropriate for staff as for members. (See the *Sample Event Invitation* on page 44 for more information.)

Business Cards–These are a **must**. You will exchange cards at the beginning of your meeting. Staff use business cards to remember your name during and after a meeting. Ideally, they will add your card to their contacts in their state or district.

News Clips–In some instances, it's appropriate to include a recent article about your issue or your work from a local or national media outlet as a leave-behind. Make sure the article is directly relevant to the work you're discussing with the member of Congress.

WHAT NOT TO LEAVE BEHIND.

Avoid long reports, glossy brochures intended specifically for other audiences and packaged promotional products. As a general rule, skip audiovisual materials like DVDs–policymakers and staff tend not to make good use of them. There are always exceptions to the list, but as you consider which materials to bring, focus on their relevance to a policymaking audience.

A WORD ABOUT GIFTS.

House and Senate offices legally must abide by strict gift rules, which state that members and their staff are only permitted to accept gifts with a value of less than $49.99 from any outside source. Although gifts of nominal value, such as a T-shirt, mug or pen with your logo, are permissible under congressional ethics rules, given attention to this issue, understand that many offices do not accept gifts of any value. Don't be offended if they turn down your offer at a meeting. Gifts are not necessary at any meeting, and nothing of greater than nominal value should ever be offered.

Prepare a One-Pager

Your one-pager is the most important document you will leave behind at your meetings. It will be the office's link to you and its point of reference about your project and the work going forward. Please pay close attention to the suggestions below as you prepare your one-pager. And, for inspiration, take a look at the examples of other one-pagers that follow on pages 29 through 31.

HERE ARE SOME TIPS TO HELP YOU PREPARE A ONE-PAGER:

1. **Use your letterhead or logo.**

2. **Use special headings, bullets and font styles** to break up dense text and to highlight each piece of information.

3. **Include complete contact information** for you or another person who is familiar with your work and can be reached easily. If you spend a lot of time traveling, use contact information for someone who is regularly in the office. *Make sure that email and Web addresses are included.*

4. **Include the date.** Staff will want to know how current the information is when they refer to it months later.

5. **Give a concise explanation of your work** in language anyone can understand. Clearly state who you are and what you do, and describe the people you are serving.

6. **Include a few facts and figures that define the problem** your work addresses, such as: "Among people in our state age 75 years or older, 30 percent report having difficulty with stairs and 40 percent cannot walk half a mile."

7. **Describe the population you serve** and use real numbers to capture your successes: "The medical emergency response teams saved 10 lives in just six months; we've reduced the rate of pneumonia for patients on ventilators to nearly zero; and, because nursing turnover has declined from 20 percent to 12 percent, we've saved the hospital several million dollars in recruitment and training costs."

8. **Highlight your partners.** If you're a coalition-based project or have other strong partnerships in the community, be sure to highlight those organizations. Adding a bulleted list is a good way to do this.

9. **Include your goals:** "We want to end medical errors in our hospital."

10. **Underscore what you have to offer.** Create a few bullets to emphasize what you can offer to policymakers and their staffs:

- *We are a resource for breakthroughs in creating truly patient-centered care.*
- *Our hospital's efforts to improve safety and quality can save dollars for both Medicare and Medicaid.*
- *We have a tested model for improving physical activity, health and quality of life for midlife and older adults.*

Sample One-Pager No. 1

THE GREEN HOUSE PROJECT
caring homes for meaningful lives℠

THE GREEN HOUSE® HOMES OF SUMMIT HEALTH RESOURCES, AR

The Green House Homes of Summit Health Resources, AR

In early September 2009, Summit Health Resources, an Arkansas LLC, became the first for-profit entity in the nation to open a Green House project. The Green House cottages of Wentworth Place, in the southern Arkansas town of Magnolia, have five Green House homes, each providing skilled nursing care for twelve elders. The Green House homes are three miles from the former nursing home on a new, park-like ten-acre campus. A 40-bed rehabilitation pavilion is also located on the campus.

In fall 2009, Summit Health Resources will open the second of their five planned Green House projects in Arkansas. The Green House cottages of Southern Hills in the rural community of Rison will be comprised of six 12-elder homes. Both Wentworth Place and Southern Hills cottages will replace traditional, 50-year-old institutions. Both projects have enjoyed wide community support. Summit Health has three other Green House projects in the early development stage in Arkansas.

Contact Info

John Ponthie
Managing Member
Summit Health Resources, LLC
2723 Alvamar Drive
Shreveport, LA 71106
(318) 797-9066
john@summithealthresources.com
www.summithealthresources.com

Marilyn Ellis
The Green House Project
NCB Capital Impact
2011 Crystal City Drive, Suite 800
Arlington, VA 22202
(703) 647-2313
mellis@ncbcapitalimpact.org
www.thegreenhouseproject.org

THE GREEN HOUSE® Project is a project of NCB Capital Impact and is funded by the Robert Wood Johnson Foundation.

A New Alternative to Institutional Care

When people need long-term care, they often must move to a nursing home or another institutional-type setting. The Robert Wood Johnson Foundation believes there is a better way to deliver and receive skilled long-term nursing care.

The Green House approach is a radically new, non-institutional model that reinvents the experience of long-term care for elders. Elders receive needed assistance and care in small homes that meet all required state and federal regulatory and reimbursement criteria for licensure as skilled nursing facilities. NCB Capital Impact provides technical assistance, pre-development loans and ongoing support to Green House providers.

As of September 2009, the National Green House Replication Initiative is active in 26 states with:

- 58 homes open
- 30 homes under construction
- 98 homes in development

The Model and Key Elements

The Green House model combines small homes with the full range of personal care and clinical services. Each element of The Green House model's operation and design is crafted to de-institutionalize skilled long-term care and return control, dignity, and a sense of well-being to residents, their families and direct care staff.

Physical environment—Each Green House home is a self-contained house for approximately 10 people. Residents, or "elders," have their own private bedrooms and bathrooms, which are situated around the hearth, an open kitchen and a dining area. Green House homes look and feel like home.

Workforce—Direct care staff (called Shahbazim) report higher levels of job satisfaction and spend more quality, one-on-one time with residents than in institutional settings. Staff share all household and care responsibilities and rotate leadership positions in these duties, which is atypical in traditional nursing homes. Job satisfaction results in significant decreases in staff turnover for many Green House providers, contributing to the consistency of care and relationships as well as improved working environments based on team decision-making and collaboration.

Person centered care—All aspects of living environment and health care are designed to allow a higher quality of life for elders. For instance, there is no pre-established schedule. Elders work with staff to set all of their daily activities and meal times. Elders receive needed care without that care becoming the focus of their existence.

Market based approach—The Robert Wood Johnson Foundation does not provide any direct funding to individual sites. The Green House homes are designed, built, and operated with a mix of public and private dollars. The Green House homes serve both private pay and Medicaid-eligible residents. A core element of The Green House Project's mission is to serve low-income individuals, regardless of their ability to pay.

Preliminary Findings

Several completed research projects compared Green House projects to nursing homes. Some findings include:

- Significantly improved quality of life for elders, as measured in an array of domains including privacy, dignity, autonomy, relationships and overall well-being
- Direct care staff in Green House homes spend more meaningful time with elders
- Higher levels of satisfaction reported by families and staff
- Less prevalence of depression by elders

Sample One-Pager No. 2

FIRST PLACE FOR YOUTH
Building a foundation for life after foster care

OUR COMMON CAUSE

Each year in the San Francisco Bay Area, more than 600 youth age out of foster care when they turn 18. These youth were originally taken out of their homes due to parental abuse, neglect or absence. Once they are discharged, all foster care services are terminated, regardless of a youth's resources or preparation for independent living. Without housing, income, health care, education or adult encouragement:

- 65 percent of foster youth will face imminent homelessness,
- 20 percent will be arrested or incarcerated, and
- only 3 percent will graduate from college.

CONNECTING THE QUALITY OF HEALTH TO THE QUALITY OF LIFE

First Place for Youth pioneered **the Healthy Transitions Project** to promote the long-term mental, physical and financial health of young people ages 16–24 leaving the foster care system. We go to where health happens, using housing as the initial stabilizing force in the lives of transition-age foster youth, while trained staff provide individualized support in the areas of education, employment, and health. Specifically, the program provides:

- Access to permanent housing with a transitional subsidy;
- Employment training and job development;
- Access to health care, mental health services and substance use treatment;
- Education assessment and academic support; and
- Adult guidance, emotional support and positive peer relationships.

MEASURING IMPACT

Over the last decade, First Place has had a profound impact on our young adult participants. Compared to other transition-age foster youth nationwide, First Place youth are:

- five times less likely to experience homelessness
- three times less likely to give birth before the age of 21
- three times less likely to be arrested
- six times more likely to be enrolled in college
- twice as likely to graduate from high school
- twice as likely to be employed

HELPING BETTER HEATLH TAKE ROOT IN OUR COMMUNITY

First Place's plans for the future include:

- Support of California's efforts to implement the federal Fostering Connections to Success act;
- Expansion into high need areas, beginning with Los Angeles; and
- Implementation of a rigorous third-party evaluation of the program model.

APPRECIATION

First Place for Youth operates the Healthy Transitions Project with the support of local funders and a four-year $500,000 matching grant from Robert Wood Johnson Foundation Local Funding Partnerships (LFP). Working with local funders—Evelyn and Walter Haas, Jr. Fund, Morrison & Foerster Foundation, Charles and Helen Schwab Foundation, Stuart Foundation, Morris Stulsaft Foundation, VanLobenSels/RembeRock Foundation and Walter S. Johnson Foundation—LFP joins the resources of a national foundation with local grantmakers and nonprofit organizations, so better health can take root in our communities. The Robert Wood Johnson Foundation supports ambitious new community solutions that meet people where health is happening-not just in hospitals or clinics but where they live, learn, work and play.

Sam Cobbs, Executive Director – scobbs@firstplaceforyouth.org
Deanne Pearn, Co-Founder & Director of Community Relations – dpearn@firstplaceforyouth.org
519 17th St., 6th Floor, Oakland, CA 94612   510-272-0979
www.firstplaceforyouth.org   April 2009

Sample One-Pager No. 3

Alliance for a Healthier Generation

American Heart Association.

Clinton Foundation

Robert Wood Johnson Foundation

Supporting healthy schools nationwide

Who We Are:

Oak Street Middle School

- Student Population: 361
- Student to Teacher Ratio: 12.7 to 1
- 30.5% economically disadvantaged households
- 89% White
- 7% African American

Contact

Geane Cleland, Principal
903 Oak Street
Burlington, IA 52601
(319) 753-6773
gcleland@burlington.k12.ia.us
www.district130.org/schools/Veterans/home%20page.html

The Healthy Schools Program

The American Heart Association and William J. Clinton Foundation partnered in May of 2005 to create a generation of healthier Americans by addressing one of the nation's leading public health threats—childhood obesity. The Alliance is working to stop the nationwide increase in childhood obesity and empower kids nationwide to make healthy lifestyle choices.

The Alliance launched its Healthy Schools Program in February of 2006 to support schools across the country in their development of healthier school environments. The program takes a comprehensive approach by helping schools improve access to healthier foods; increase both physical education and physical activity opportunities before, during and after the school day; enhance nutrition education; and establish school employee wellness programs. The Robert Wood Johnson Foundation is the major funder of the Healthy Schools Program.

Contact

Ginny Ehrlich, National Schools Director
Alliance for a Healthier Generation
55 West 125th Street
New York, NY 10027
(503) 595-2568
ginny.ehrlich@healthiergeneration.org
www.healthiergeneration.org

The Challenge of Childhood Obesity

Childhood obesity is an urgent threat to our children's health. During the past four decades, obesity rates have soared among all age groups and have more than tripled among school-age children. Today, nearly 25 million young people in the United States are considered obese or at risk for obesity.

If we don't act to reverse this alarming trend, we're in danger of raising the first generation of American children who will live sicker and die younger than their parents' generation. Preventing obesity during childhood is especially critical, as overweight adolescents nationwide have up to an 80 percent chance of becoming overweight or obese adults. Because kids spend 30 hours per week or more in education environments, schools are uniquely well-positioned to influence the childhood obesity epidemic.

The Healthy Schools Program Approach

The Healthy Schools Program is working to prevent childhood obesity by making schools healthier places to learn and work. The program's comprehensive approach helps schools:

- Improve access to healthier foods
- Increase opportunities for physical activity
- Establish school employee wellness programs

The program offers participating schools ONSITE and online support, including best practice guides, web-based seminars, and tools to promote physical activity and healthy eating among students and staff. The support is available at no cost to any school in the country – public, private or charter.

An important part of the Healthy Schools Program is the opportunity for schools to be nationally recognized for their achievements at platinum, gold, silver and bronze award levels. During the program's 2006 pilot year, 230 schools received onsite support from the Healthy Schools Program. Ninety percent implemented at least one new policy or practice to promote health and 28 of these schools were recognized for these efforts with a bronze medal award. By the end of 2008, at least 3,000 schools will be receiving onsite support from the Healthy Schools Program.

Oak Street Middle School Experience

In its efforts to support healthy behaviors, Oak Street Middle School has implemented changes in several key areas. The school cafeteria has eliminated all fried foods in favor of baked items, including baked french "fries." It now offers at least two fresh fruits and vegetables at lunch and at least one fresh fruit at breakfast. According to Betsy DeBower, the health teacher at Oak Street Middle School, apple and orange slices and kiwifruit consistently rank among the students' favorites.

Teachers and staff identified 60 students in need of additional tutoring, physical activity or social skills and created a program for them combining an hour of tutoring with an additional hour of physical activity, as well as a nutritious snack.

Since January 2008, staff has been invited to participate in an on-site individual weight loss program. Staff members exchange weight loss tips and discuss how to incorporate more physical activity into their day. One group of teachers has started to walk the halls after school as part of the new program.

Looking Ahead

Because students only get structured physical education once or twice a week, DeBower hopes to create an after-school fitness club that provides additional opportunities to be active. Also, in light of research suggesting that students who engage in physical activity before class have improved test scores and concentration, teachers are planning to institute short physical fitness breaks, focused on activities like stretching and jumping jacks, at the start of each class.

Strategy Worksheet for Your Congressional Meetings

COMPLETE ONE STRATEGY WORKSHEET FOR *EACH* OF YOUR HILL MEETINGS.

This meeting is with member:

Staff member(s):

Date/time of meeting: Location:

"We'd like to thank you."

What work has this member of Congress or his or her staff done on your issue or for your work?

"We know you care about…"

What links does he or she have to your issue that you will capitalize on in your story, ask or description of your work?

"Let us tell you about our work."

List the three most important points you want to make about your work in this specific meeting:

1.

2.

3.

"Let me tell you a story."

What story will you tell in this specific meeting and why?

"There's a specific way you can help us."

What is your specific ask for this meeting?

DEFINE THE STRUCTURE OF YOUR MEETING

Outline the flow of your meeting. What information will each person deliver? Who will speak first? Who will speak second?

Speaker #1 (name and key message points):

Speaker #2 (name and key message points):

Who will tell the story?

Who will make the ask?

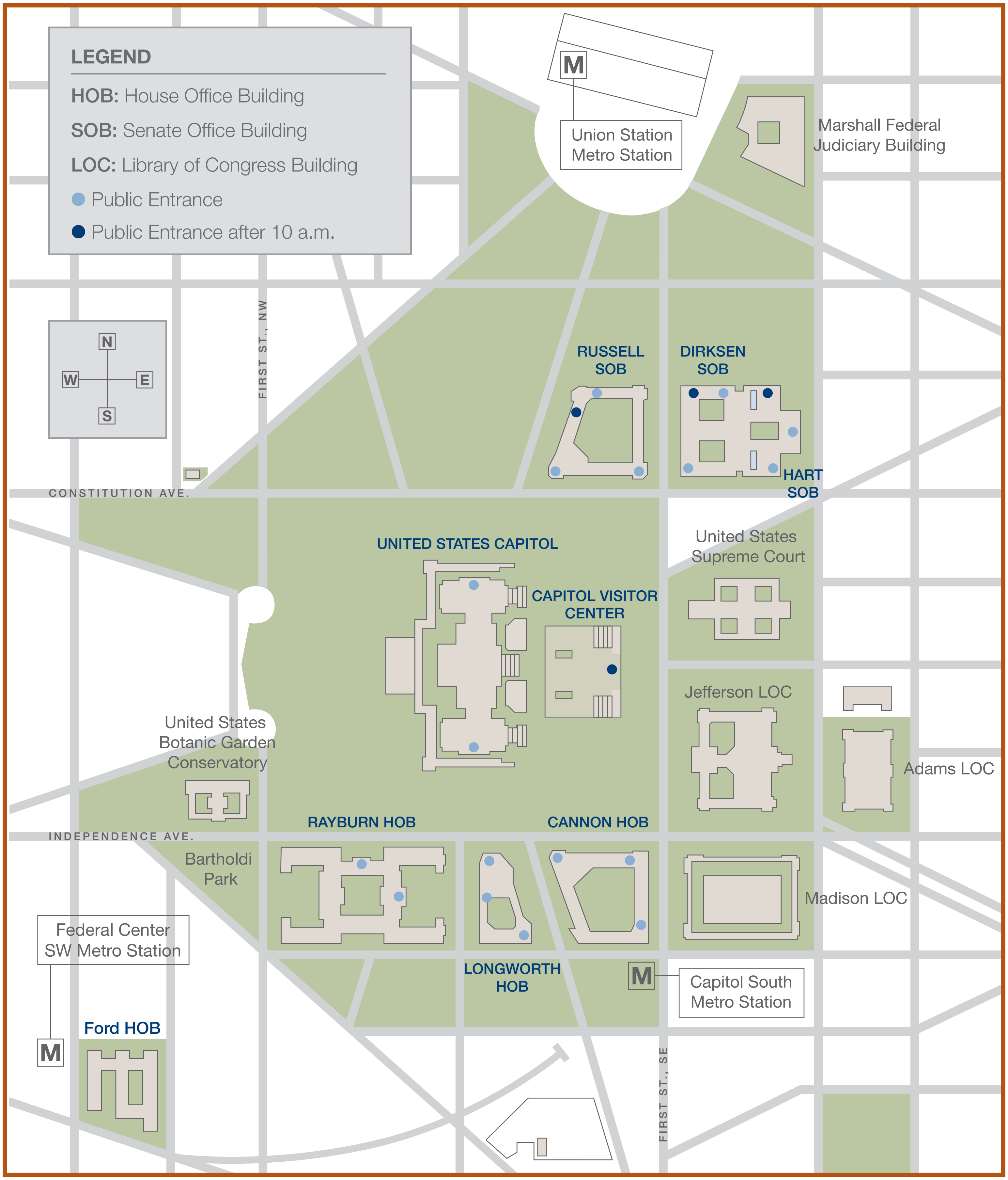
Who will keep track of next steps and contact information?

Notes

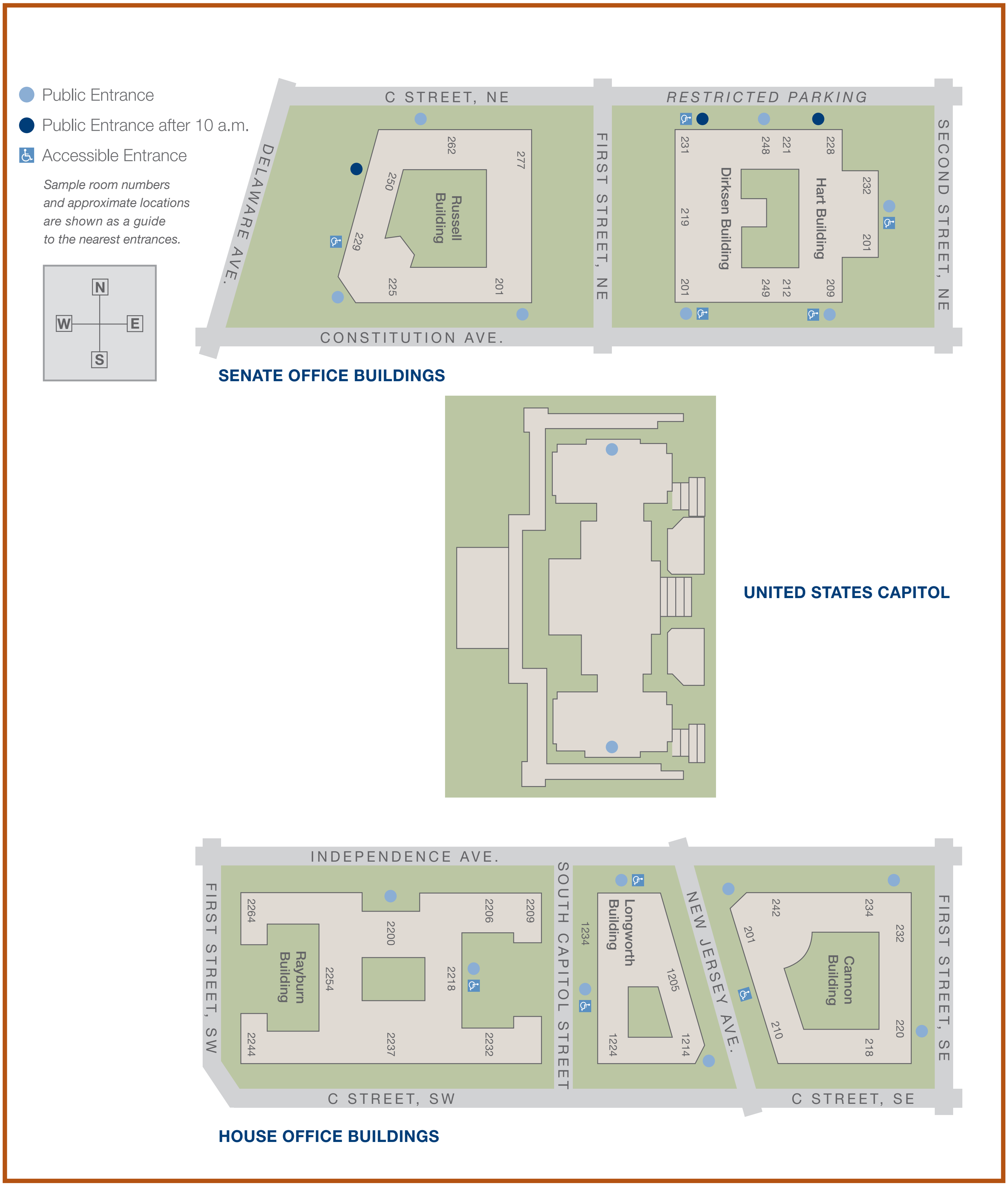
“We were standing in line to get coffee and soda and that type of thing in the basement of one of the buildings, and one of our representatives walked by. We had just been at her office, and Dan said, ‘That’s Betty McCollum.’ So we said, ‘Let’s wait until she comes out and then let’s get her...’ She was very receptive. She shook our hands and said, ‘Let’s walk back up to my office,’ and we were able to describe to her our program and what we were doing.”

Anne Willaert, project director
Robert Wood Johnson Foundation
Local Funding Partnerships
Minnesota Community Health Worker Project

Capitol Hill Map



Capitol Hill Entrances and Room Numbers



Policymaker Office Staff: Know Who's Who

Understanding the job responsibilities of the staff who work in policymaker offices can help you target your requests and provide relevant information to these staff members. Though every office is different, here's an overview of typical congressional office positions, with comparisons to state and local offices.

CONGRESSIONAL OFFICES

Both senators and representatives have Washington, D.C., offices and one or more offices in their home states or congressional districts. Understanding the job responsibilities of the staff who work in these different offices can help you target your requests and provide relevant information to these staff members. Although every office operates with its own setup, here's an overview of the various positions.

IN WASHINGTON, D.C.:

The **Staff Assistant** handles the front desk duties, which include answering phones, greeting visitors, sorting mail, and coordinating tours. This person could help you get a tour of the Capitol while you are in town. They have few, if any, issue responsibilities. However, they can tell you which Legislative Assistant handles your issue and connect you with the scheduler and other staffers.

The **Legislative Correspondents (LCs)** are responsible for reviewing and responding to constituent communications, as well as supporting LAs with some of their policy work. They may attend your meeting with the LA or they may serve as a replacement if a scheduling conflict occurs. Over time, legislative correspondents are often promoted to legislative assistants.

The **Legislative Assistants (LAs)** are responsible for the bulk of the policy work in the office, and each one usually handles a specific range of issues. For example, an office may have a different LA for workforce issues, health and social issues or juvenile justice issues. It is as important to establish a relationship with the LA who covers your issue as it is to do so with the member. Most of your meetings will be with or include the LA who focuses on your issue. He or she is likely to be your primary contact in the office as you move forward.

The **Legislative Director (LD)** is in charge of policy issues and managing the legislative staff. This includes monitoring the legislative schedule and making recommendations to the member about specific legislation. They may also cover a specific set of issue areas. An LD may attend a meeting along with the member or meet with you solo when your issue overlaps with his or her portfolio.

The **Press Secretary/Spokesperson/Communications Director** fields calls from the media, writes news releases, and is often the spokesperson for the office. This person can be valuable when you are holding events that include both the member and the media. If a member of Congress is attending one of your events, you should touch base with this person to coordinate media outreach (see the *Site Visit Planning Guide* on page 46). The state or district office sometimes has a press secretary as well.

The **Scheduler/Administrative Assistant (AA)** is responsible for managing the member's schedule. Some members of Congress have one Scheduler based in D.C. who manages their entire schedule, and others have one Scheduler in D.C. and one in the district or state who keeps the "home" schedule. If you are scheduling a meeting with a member of Congress, you must work with his or her Scheduler (see *After Connect: Scheduling Your Own Meetings* on page 53).

All congressional offices expect you first to submit an official meeting request via email or fax to the Scheduler. Although most often referred to as the Scheduler, this person may also be called an Appointment Secretary, Personal Secretary or Executive Assistant.

The **Chief of Staff (CoS)** oversees the entire operation and reports directly to the member of Congress. They are often responsible for gauging the political outcome of various legislative proposals and constituent requests. This person may sit in on meetings, but your primary contact will usually be the LA.

IN THE STATE OR CONGRESSIONAL DISTRICT OFFICE:

The **State or District Director** runs the state or district office. This person manages all the activities and staffers in the local office and focuses on local priorities and political issues for the senator or representative. This person often meets with local constituents. You can call your local office and request a site visit to your organization, or you can ask for a meeting with the State or District Director in the home office to discuss your issues.

The **Caseworkers** are primarily assigned to help with constituent requests but may also be responsible for outreach to specific groups. They often work to resolve constituents' problems with federal agencies on issues such as Social Security and Medicare, veterans' benefits, immigration concerns and passports. They may also be referred to as Constituent Service Representatives or Community Liaisons. Depending on the subjects they deal with, it may be appropriate to educate them about your work.

STATE AND LOCAL POLICYMAKER OFFICES

Compared to congressional offices, state and local legislator offices tend to be much smaller. Even a senior policymaker at the state level has no more than two or three staffers, and it is not unusual for two state policymakers to share a staff person. Part-time staff members are even more common for local legislators like city council members or county commissioners.

Getting Around Capitol Hill

SECURITY

You will have to pass through a metal detector and place your items on a conveyor belt to be inspected by an X-ray machine when entering buildings on Capitol Hill. You are likely to encounter short waits each time you enter a building. Simply be courteous, efficient and travel light, wear minimal jewelry and bring only the things you need for your meetings. House and Senate buildings have multiple entrances so if you encounter long lines at one entrance, try another one.

FINDING YOUR MEETING

Congressional offices are located on either side of the United States Capitol building. (See *Capitol Hill Map* and the entrance guide on pages 35–36.)

Walking from the House buildings to the Senate buildings takes about 10 minutes. You may be walking a lot, so wear comfortable shoes. Once inside the building, look on the walls for signs directing you to specific room numbers. If you get lost, ask the Capitol Police for help.

You may need to take a cab if your schedule is tight, so bring extra cash for cab fare.

LUNCH

On the House side, the Longworth and Rayburn Office Buildings have options for lunch, as well as the Dirksen Office Building on the Senate side. There are also several cafés and restaurants located on Pennsylvania Avenue east of the Capitol (House side) and in and around Union Station (Senate side.)

Don’t Forget:

- ☐ Business cards
- ☐ Copies of your one-pager
- ☐ Cash for cab fares
- ☐ Digital camera (if you have one)
- ☐ Comfortable shoes
- ☐ If appropriate, a letter of invitation for the member to visit your program or attend an event

Between Meetings: Being a Tourist on Capitol Hill

There are many activities to keep you busy on Capitol Hill if you have extra time between meetings. Here are a few suggestions:

- Pick up a souvenir at the **House Gift Shop** in the basement of the Longworth Office Building, or the **Senate Gift Shop** located on the basement level between the Dirksen and Hart Office Buildings.
- Visit the **Supreme Court**, located at One First Street, NE, across First Street from the U.S. Capitol and across East Capitol Street from the Library of Congress. Visitor information is available at *www.supremecourt.gov*.
- Take a tour of the **Capitol building and the Capitol Visitors Center**. The Capitol Visitors Center is open to the public Monday through Saturday, except holidays. To see the Capitol grounds beyond the Capitol Visitors Center, you must make a reservation in advance. Visitor information is available at *www.aoc.gov/cc/capitol/index.cfm*.
- Check out the **Library of Congress**, located at 101 Independence Avenue, SE. Visitor information is available at *www.loc.gov/visit*.
- Visit the **U.S. Botanic Garden**, one of the oldest botanic gardens in North America. Visitor information is available at *www.usbg.gov/index.cfm*.
- Visit the many shops inside **Union Station**, which include clothing shops, bookstores, restaurants and novelty shops.

And perhaps the most exciting way to spend time in between meetings:

Sit down outdoors or in a cafeteria and write up the **next steps** that came out of your last meeting. Or draft your thank-you notes or brainstorm new asks for your next meeting. This is also a great opportunity to people-watch, and there's no better place for it than Capitol Hill!

“The follow-up can be a big commitment of time, but I think it’s worth it. We recently had a Congressman visit, and we felt prepared and maybe even a bit amazed that it all really worked! It will make a difference that he saw our community efforts firsthand.”

Susan DeFrancesco, research assistant professor
Healthy Kids, Healthy Communities
Cuba, New Mexico

Follow-through Is Everything

The success or failure of your meeting is determined almost entirely by what you do after the meeting. It's up to you to maintain and build on your relationships with your policymakers and their staff.

BE PERSISTENT BUT POLITE WHEN CONTACTING STAFF ABOUT THE ASKS YOU PUT FORWARD AT YOUR MEETING. THE EFFORT TO BRING YOUR ASK TO FRUITION FALLS TO YOU, AND IMMEDIATE AND FOCUSED FOLLOW-UP IS CRUCIAL TO MAKING THIS HAPPEN.

SEND A THANK-YOU NOTE

A well-crafted thank-you note serves to gently but clearly remind the staffer or policymaker of the asks you made and the commitments they made. Summarize the points you covered during your meeting and thank the policymaker and/or staff member for their support and interest. Remind them of the action they agreed to take and recap next steps–both yours and theirs. For staff, a simple text email works great. For policymakers, you may want to create a PDF of the thank-you note and send it in an email. Either way, it's important to send your note as soon as possible, so they receive it while your meeting is still fresh in their minds. You can also send a hard copy of your thank-you note, but don't rely on this to reach their office in a timely manner. The samples that follow illustrate thank-you notes to a policymaker and a staff.

FOLLOW-UP CALLS

Policymakers and their staff are busy people. For that reason, they tend to appreciate reminders and respond to polite but persistent follow-up. Place your initial follow-up call no more than one week after sending your thank-you note, and don't hesitate to leave a voice mail message. If your initial call goes unanswered, try again the following week. Mixing calls with email and decreasing the waiting period between follow-up efforts are both time-tested techniques to keep your issue and your ask on the radar screens of busy policymakers or staff.

MAKE SAYING YES EASY AND REWARDING

A little research can help you to reduce the obstacles to and increase the appeal of fulfilling your ask. For example, if you've invited a member of Congress for a visit, looking up the congressional calendar to learn about upcoming recess periods (time when they are back in the state or district) will help you to suggest dates when the member is more likely to be available. Or, if you've asked a state senator for a support letter, asking coalition partners to send brief supportive emails to the senator's staff can send a signal that fulfilling your ask will be valued by a broad range of community leaders.

Sample Thank-You Letter to a Policymaker

May 22, 2011

The Honorable Dianne Feinstein
United States Senate
Washington, DC 20510

Dear Senator Feinstein:

It was a great pleasure to meet with you and your staff last Tuesday. We are so pleased that you'll be visiting Fairview Life Independent this summer when you're back in the district.

Your leadership is so important to our work to help our community's frail elderly and chronically ill people remain independent and in their own homes. As we discussed when we met, the support and interest you demonstrate with your visit will help us gain the attention of other influential members of our community, especially the media and potential funders.

We will follow up with your scheduler in the coming week to arrange this visit. I have sent the report you requested, along with background on the planned forum on long-term care next fall, to Gordon Jansen. Gordon was extremely helpful during the rest of our meeting last week and I look forward to working with him on the forum.

Thank you again for your time and support.

Sincerely,

Miles R. Culkin
Program Director

Rachilla Perez
Volunteer

cc: Gordon Jansen
Legislative Assistant

Sample Thank-You Email to a Staff Member

From:
Subject:
Date:
To:

Dear Gordon,

Thank you so much for taking the time to meet with my colleague, Rachilla Perez, and me during our visit to Capitol Hill last Tuesday. Senator Feinstein's leadership is important to our work to help our community's frail elderly and chronically ill people remain independent and in their own homes.

We are very excited about the possibility that the senator can visit Fairview Life Independent this summer when she is back in California. As we discussed when we met, her visit would demonstrate support and interest that will help us gain the attention of other influential members of our community, especially the media and potential funders.

We are also grateful for your offer to virtually introduce us to your scheduler, Erin Kohler, via email. Perhaps you can forward her this message and copy me?

I also have attached the report you requested, along with background on the planned forum on long-term care next fall. I look forward to working with you on the forum.

Thank you again for your time and interest.

Sample Event Invitation

The Honorable John Doe
United States House of Representatives
Washington, DC 20515-3225

Dear Representative Doe:

Thank you again for taking the time to meet with us on May 5 in your Washington, D.C., office. As we discussed at that time, I'd like to invite you to host our annual volunteer recognition dinner, which will be held at Antonio's Restaurant in Albany at 6 p.m. on June 27.

Faith in Action of Central New York is honoring our 100+ volunteers for the tremendous commitment they make to our community's seniors with a very special dinner celebration, and we hope that you'll be able to help us honor their work. Our guests will include volunteers and their families, as well as our mayor, members of our city council, and Assemblyman Charles Brown. If you're available, you could arrive at 6:15 p.m. and have the opportunity to speak with some of our volunteers during a brief reception. Dinner begins at 6:30, and we'd like you to speak at 6:45 p.m. for approximately 15 minutes.

Last year, our dedicated volunteers cared for more than 900 frail elderly and chronically ill people in our community. They offered them rides to medical appointments, hot meals, friendly visits, assistance in caring for their homes and pets, and telephone reassurance. For our clients, they offer critical assistance that helps them remain independent and in their own homes for as long as possible.

Our program, which includes volunteers of many faiths, was funded through Faith in Action, a national program of the Robert Wood Johnson Foundation that provides grants to communities to develop interfaith volunteer caregiving coalitions. Coalitions include not only churches, synagogues and temples, but also social and health service agencies that want to develop an interfaith volunteer caregivers project within their organization.

Interfaith volunteer services fill in the gaps. Today, there are more than 1,000 of these coalitions throughout the country.

I hope you will consider my invitation. If June 27 is not convenient for you, we would be pleased to set up an opportunity to visit with our clients and volunteers on a day that works better. Please contact me at (315) 555-5555.

Sincerely,

Rev. Terry Culbertson
Executive Director

cc: Jim Smith, Legislative Assistant

Working With Your U.S. Senator or Representative's State or District Offices

Members of Congress have both a Washington, D.C. office and one or more local offices in their state or district. Engaging the district or state office in your work is a great way to build a long-term relationship with your member of Congress.

Although most of the legislative and policy work happens in the D.C. office, the local office functions as a more direct link between members of Congress and their constituents. Local offices help members stay connected with the people they have been elected to represent, and to what's happening in their communities. Local office staff members are often well networked with businesses, prominent community groups and other organizations.

An important function of the district or state office is to help constituents resolve problems with federal agencies (such as helping a constituent navigate a difficult issue with Social Security). Local staff members also stand in for the member of Congress at community events and in individual meetings. They often present their bosses' views publicly and serve as the link to various constituencies and organizations. In this role, they can be very helpful to you in your work. They may be willing to represent the member on your advisory board or serve as an official liaison to your organization.

Local staff also may have more time to devote to your issue and learn how that issue affects the member's constituents.

If you're working on a site visit or some other local event with your member of Congress, the local office will be crucial to your success. These offices often keep the policymaker's schedule for the time he or she is in the district or state, and they will be familiar with local venues, community leaders and media.

SOME POINTS TO KEEP IN MIND:

Take advantage of a local meeting to draw out the relationship between your work and local issues. Always tie your work to the interests of constituents. And remember, you are a constituent, too.

Establish yourself as an expert. Because district offices are smaller, staff people may have to deal with a broader set of issues. This means they rely on expertise from outside sources even more than the D.C. staff.

Participate in town halls and other public forums hosted or attended by your policymaker to raise your visibility and strengthen your relationship with your member and the local office staff.

Capitalize on designated office hours. Some members may set aside times when they are in the local office (or at some other set location) and available for walk-in meetings with the public.

Make use of your staff connections. If you have had a meeting in Washington, D.C., be sure to get the name of the local staff person you should be in contact with (and a referral). Likewise, if you have a good contact in the local office and plan to visit D.C., ask them for an introduction to the right person in the Washington office.

To find the locations of your members' district offices, visit their websites at *www.house.gov* or *www.senate.gov*.

Site Visit Planning Guide

A well-organized site visit helps policymakers champion your work by giving them the opportunity to see your work in action. Careful planning ensures that you get the most from the visit, and you make a lasting impression.

BEFORE THE MEETING

FIND A DATE.

Suggest a specific date (or two) for the visit. However, unless these are the only dates available, indicate the dates are flexible and, if they aren't feasible for their office, you can work with them to find a date that suits.

USE YOUR POLICYMAKER'S TIME CAREFULLY.

Find out how much time the policymaker plans to spend. If he or she only plans to spend 20 minutes, you want to make sure that everyone is well prepared and that they can deliver their messages *concisely*. If the policymaker plans to spend an hour or more, take advantage of this extra time; you could schedule a brief reception and increase your invite list, or arrange for an informal roundtable with the policymaker and a handful of key partners who have great stories to tell about your success.

INVITE WIDELY BUT WISELY.

If your policymaker's schedule allows a lengthier visit and you have the space, consider inviting a wide variety of people–clients, current and potential funders, other policymakers, existing and potential partner organizations and coalition members, and local civic leaders. Even for short visits, plan to invite one or two key people from among these groups. A visit from your policymaker is also an excellent time to invite any people whom you want to engage in your work but who have been reluctant to meet with you in the past. ***A note of caution***: Some people or organizations may see your policymaker's visit as an opportunity to advance their own agendas. Make sure *everyone* understands the focus and purpose of the visit to minimize potential distractions.

CAREFULLY CONSIDER SPEAKERS AND MESSAGING.

Think strategically about who should speak and how their remarks fit with your overall message. Be sure to include your mission, services and challenges in a way that is relevant to the policymaker. Also, be sure to mention partners and community support, if applicable.

PRACTICE FENG SHUI.

Think about how you want to arrange the room where most of the site visit will take place. If it's a smaller group, you may want to arrange the seats in a circle, or around a table, to create a more casual environment that will foster the sharing of ideas.

SHARE A PERSONAL STORY.

Choose one person who has benefited from your work to explain how it has affected his or her life. Be sure this person is a constituent of the policymaker. Often the true story of a single person carries more impact than any other part of a visit.

INVITE MEDIA.

Check with the policymaker's press secretary before your event to find out if the office plans to invite media, and whether the policymaker will be holding other media events that day. If they are not issuing a press release, write your own and share it with the press secretary. Send it to your local newspapers, as well as to TV and radio stations. The policymaker's press secretary may be able to provide you with a list of media outlets, as well as a quote from the policymaker.

NOTE: In some cases, it may not make sense to invite media. You may purposefully want to create an "off the record" event that would not include the press.

APPOINT A KEY CONTACT.

Appoint someone to greet the policymaker and guide him or her through your event. This person should also establish contact with the district staff person who will accompany the policymaker on the visit. Be sure that the policymaker and their staff person receive briefing materials before the visit. Depending on the type of visit, staff may request talking points for the policymaker, as well as project results, relevant data and the guest list.

SHARE THE LIMELIGHT.

Acknowledge funders, leaders and your staff members who have contributed to your work's success. If there is time, consider giving them a few minutes to explain why they have supported your work.

AFTER THE MEETING

MANY THANKS.

Send thank-you letters to the D.C. and district staff members who helped you set up the visit, as well as to the policymaker. In the letter to the policymaker, recognize the staff members who were particularly helpful to you or who offered to do additional work on your behalf. Copy those staff on the letter to the policymaker.

STAY IN TOUCH.

Keep staff updated on events and the impact you are making within the community. Keep them on your mailing list. If one of your clients shared his or her story during the visit, keep the staff person up to date on that person's situation.

SEND PHOTOS.

Share a few of the best shots with the policymaker's office and include a short note. Better yet, email some of the pictures of the visit to the policymaker's office the same day. They may end up on their website.

THIS IS JUST THE BEGINNING.

If the policymaker agrees to take some action on your behalf, determine which staff person is the point person who will work with you to follow up. It's important to stay in touch and work with that staff person to make it happen.

Event Checklist

☐ FOOD
You don't have to try to impress anyone, but do serve appropriate snacks and beverages.

☐ PHOTOGRAPHER
Make sure you hire a good photographer to record the event. These photos will come in handy. Be sure to secure proper permissions with consent forms.

☐ NOTE TAKER
Arrange for someone to take notes during the visit and prepare a written report afterward.

☐ NAME TAGS
You may know everyone in the room, but name tags will be very helpful for the policymaker and his or her staff, as well as other guests.

☐ MATERIALS
Be strategic in selecting the materials for the meeting. Limit yourself to just a few key documents, keep them brief, and make sure that your contact information is on everything you provide to the policymaker or staff person.

☐ KEY CONTACT
Make sure your greeter is familiar with the objectives of the visit and knows the schedule for the day. Make sure he or she will recognize the policymaker upon arrival and knows everyone he or she needs to meet during the visit.

WHEN PLANNING A SITE VISIT, ASK YOURSELF THE FOLLOWING QUESTIONS:

1. What do I want the policymaker to remember about our work?
2. What is the objective of the event? What is my ask?
3. Who will speak? What messages will each speaker deliver?
4. What do I want the policymaker to see during the visit?
5. Whom will she or he meet?

“I kept thinking that if all of the projects I funded were here on the Hill this week while they’re studying Medicaid, and they really heard from all of us and we were educating them, how much better all the public policy would be — and I think the message for me is go back to our local people, to our state people, and really we need to get out there and inform them, so whatever [the] party, they’re making good decisions.”

Margaret Distler, executive director
Robert Wood Johnson Foundation
Local Funding Partnerships
St. Joseph Community Health Foundation, Indiana

Tips for Reaching Out to State and Local Officials

State and local officials are an important audience for your work—just as important as members of Congress. You can apply many of the same principles you used with members of your congressional delegation in order to prepare for a successful meeting with your state and local policymakers. Still, there are some important differences worth considering as you develop your strategy for engaging them in your work.

SO, HOW DO YOU APPLY WHAT YOU'VE LEARNED ABOUT MEETING WITH FEDERAL POLICYMAKERS AT THE STATE AND LOCAL LEVELS?

REMEMBER THE *ANATOMY OF A MEETING*.

Follow the basic tenets previously outlined in the Anatomy of a Meeting: Start with a compelling introduction and humanize your work with a personal story. Then present them with your strategic ask and be sure to follow up to continue to build the relationship. This is a simple strategy for success that works at all levels of government.

CUT THROUGH THE CLUTTER

State and local policymakers, like federal officials, are busy people who get bombarded with information every day. Tailor your one-pager to localize the issue so that it's relevant to the work of the state or local official with whom you're meeting.

DO YOUR RESEARCH

Find out all you can about your state and local officials. Although information may not be as plentiful as for their national counterparts, it's still available. Start with the Internet; explore the website for your state legislature, which may provide links to individual policymakers' pages. Visit the websites for possible national associations your officials might belong to, such as the National Conference of State Legislatures (*www.ncsl.org*), the National Governors Association (*www.nga.org*), or the U.S. Conference of Mayors (*www.usmayors.org*). Follow the news to get a sense of how each official is being covered. Attend town halls and other events where they may be speaking. Most important, tap your friends and colleagues for information–they are often the best resources.

LOOK FOR THE LINKS TO YOUR WORK

As you research your policymakers and their backgrounds, look for common interests or shared affiliations. For instance, many state and local officials have other full-time jobs. How might that experience influence their interest in your particular issue? Does it present opportunities for you to engage them in support of your work?

LOOK FOR LINKS TO OTHER INFLUENTIAL PEOPLE

Sometimes, marching straight to your local policymaker to deliver your message may not be the best strategy. Perhaps another, more closely-linked, partner could carry the message for you, or at least facilitate a credible introduction. Explore the relationships you have with your board, businesses, the faith community, or other people who may be closely linked with the official you want to reach.

BE FAMILIAR WITH RESTRICTIONS.

Each of your organizations may have different restrictions on what you are allowed to do or ask when working with officials at the state and local levels, in addition to the rules on what you can do or ask for when you are using grant funds from RWJF. Be sure to familiarize yourself with any such restrictions prior to engaging these officials.

THINK LONG TERM.

Think of the relationship-building process as a long-term investment. What are some simple steps to get an official engaged in your work in the short term that will benefit you down the road? Be patient; some benefits may appear immediately, but others may take some time to materialize.

BE AWARE OF THESE DIFFERENCES WHEN WORKING AT THE STATE OR LOCAL LEVEL:

ALL STATES ARE DIFFERENT.

Unlike Congress, where similar rules apply to all, each state is unique in terms of the rules, processes and procedures that govern its policymaking. Start with your state legislature's website to gather basic information about how your state operates. You can also check the website for the National Conference of State Legislatures (*www.ncsl.org*) for legislative news and updates, policy forecasts and information on state versus federal policy.

TIME MAY BE SHORT.

Most state legislatures are not in session year-round; some may meet for only a few months to begin the year, others may meet only every other year. Refer to your legislature's website for specific information about your state's session schedule.

THINGS HAPPEN FASTER.

At the state and local level, the policy process often moves much more rapidly than at the federal level, where debates can go on for years without any significant movement.

STAFF MAY BE LIMITED.

State legislators and local elected officials will generally not have as much staff support as a congressional office. This may mean more face time with the elected official; it may also mean working with one staff person whose responsibilities run the full gamut of issues under the policymaker's purview.

"As we were leaving the office, there was a woman waiting to go in next. She was a woman from New Hampshire that I work with, and she supports a lot of our efforts, and it reminded me that there are a lot of people down here all of the time, and that if we're not here, we're not going to be listened to. So not only do we need to know who else is down here and what they're saying, but maybe we need to partner with them in the message that they carry down, and remind ourselves that we have much more of this kind of work to do in order to have our voice be heard among the ranks of others."

Alan Robichaud, community fellow
Reclaiming Futures of New Hampshire

Working With the Executive Branch

Members of Congress and state legislators aren't the only policymakers who can be important to you and your work. The executive branch and its agencies play a prominent role in the policymaking process and can be a strategic choice for outreach.

On the federal level, the executive branch includes the president and all of the individuals, agencies and departments that report to the president. Collectively, they are responsible for administering and enforcing the laws approved by Congress. At the state and local level, governors, mayors and their supportive agencies play a similar executive role in relation to state legislatures or local councils.

The executive branch develops the rules and regulations that correspond to the day-to-day operation of programs authorized by the legislative branch. In this context, outreach to executive branch policymakers–often called "administrative advocacy" or "regulatory advocacy"–represents an attempt to understand or affect already legislated policies such as agency rule-makings, proposed regulations or grant programs.

Many of the relationship-building tools that work with members of Congress and state legislators also apply to working with the executive branch.

SO, HOW DO YOU BEGIN WORKING WITH THE EXECUTIVE BRANCH?

IDENTIFY THE RIGHT CONTACT.

Because executive branch departments and agencies are complex in structure, it can be difficult to identify the right person to talk to about your program. In addition, there may be several people who cover your issue, even across agencies or departments; however, but not all of them will have the authority to act on your behalf.

TWO PLACES TO START.

1. **FirstGov for Nonprofits,** the official Web portal for the U.S. government with agency-specific resources for nonprofits, located at *www.firstgov.gov/Business/Nonprofit.shtml*; and

2. **The Federal Citizen Information Center's "Contact Center,"** which has links to employee locators for all federal agencies at *www.pueblo.gsa.gov/call/phone.htm*. At the state level, you can link to official state websites with agency and department listings from the National Governors Association at *www.nga.org*. The governors biographies here link directly to the state websites.

WORK THROUGH YOUR DELEGATION.

Members of Congress or state legislators are often more successful in getting a response from someone in the executive branch than you as an individual might be. Asking them to contact the appropriate agency to register support for your grant proposal, submit questions regarding a proposed rule or otherwise weigh in on an issue on your behalf may be your best option for establishing a connection. This approach also offers an opportunity to further develop your relationship with that member's office. The office may also be able to help you identify the right person within an agency or department for you to contact about your issue.

COMMENT ON PROPOSED REGULATIONS.

By law, anyone can participate in the rule-making process by commenting in writing on the rules proposed by federal agencies. Proposed agency regulations are first published in the Federal Register with a time period for public comment. At the federal level, you can find, view and comment on regulations for all agencies at *www.regulations.gov*. You can view the Federal Register directly at *www.gpoaccess.gov/fr/*. Many agencies also consider petitions from outside groups to issue, change or cancel a regulation.

COLLABORATE WITH OTHER GROUPS.

It's difficult to keep up with all of the proposed rules and other agency notifications, and the Federal Register isn't the most tantalizing daily reading. This is one compelling reason to consider coordinating with like-minded advocacy groups or joining coalitions that keep a close track of these types of developments.

JOIN AN ADVISORY PANEL.

Many programs within executive branch agencies and departments at both the federal and state level have advisory panels that nonprofits are able to join. In addition, the president, governors and mayors periodically appoint panels or commissions made up in part of nonprofits, community groups or other experts. Navigating membership onto one of these panels may be difficult, but all the more reason to begin the relationship-building process early on. Consider asking your member of Congress or state legislator to put in a good word on your behalf.

SAY THANK YOU, AND OFFER HELP.

Most agency and departmental-level executive branch officials rarely get recognized for the work they accomplish. Saying thank you, especially in a public way, will not go unnoticed. In addition, unlike members of Congress and state legislators, they don't tend to have a geographic constituency to which they are held accountable, so they are more likely to help you if you can help them meet their objectives.

BE AWARE OF LOBBYING RESTRICTIONS.

Because executive branch agencies primarily deal with legislation already passed and enacted by the Congress or state legislatures—versus pending legislation—nonprofits have considerable leeway for interaction at this level. However, some restrictions do exist. For instance, at the federal level, the president and cabinet-level officials are sometimes considered "legislators" because they participate in the formulation of legislation in their jurisdiction. For example, discussing a pending appropriations bill to fund substance-abuse screening with the Secretary of Health and Human Services would constitute lobbying. The rule applies similarly to governors and mayors and their executive officials.

"It's about building relationships. We left today feeling like we had started a relationship that we can really grow. We have to do the next steps, obviously, as we all do, but it's an opportunity that wouldn't have landed in our laps just by accident. Now we really have to take this and cultivate it and take it to the next level."

The Honorable William Hitchcock
Master and Judicial Fellow
Children's Court, Alaska Court System
and Reclaiming Futures Anchorage

After Connect: Scheduling Your Own Meetings

After your Connect visits, take advantage of trips to the Capitol—whether for family vacations, conferences or other events—to meet with your member of Congress or their staff and update them on your work. To schedule your own meeting with your member of Congress in Washington, D.C., follow these steps. Similarly, you can schedule meetings with policymakers when they are back in your state or district.

Start the process of scheduling your meeting with your senator or representative three to four weeks before your visit. Because members' schedules change constantly, arranging a meeting any earlier may be difficult.

STEP 1: WEBSITE

To schedule a meeting with a member of Congress, you must work with their scheduler. Many congressional offices have online meeting request forms available on their website. See page 55 for a sample meeting request letter.

STEP 2: EMAIL

Follow up with an email to the scheduler on the same day. Email them your meeting request letter. Use the following formula to determine their email address (although this formula does not work 100 percent of the time, it is fairly reliable):

House of Representatives:
firstname.lastname@mail.house.gov
(e.g., *john.doe@mail.house.gov*)

Senate:
firstname_lastname@memberlastname.senate.gov
(e.g., *jane_doe@reid.senate.gov*)

STEP 3: PHONE

If you do not receive a response from the scheduler within a few days (this is normal), call the office to follow up.

All of your calls will be answered at the front desk by a staff assistant or intern. They will ask for your name and organization and then check to see if the scheduler is available. Many times–whether the scheduler is in the office or not–you will be told they are not available. In that case, always ask to leave a message on the scheduler's voice mail.

If you reach the scheduler: Introduce yourself and describe the email you sent. Even if they say they haven't seen it, describe the project briefly and try to schedule the meeting while you've got them on the phone. Also offer to fax or email it to them again.

- **Have a short, one- to two-sentence description of your work ready to deliver.** Focus on the area you serve in the member of Congress' district.
- **Be sure to give the names and titles of the people attending the meeting.** Members of Congress want to know in advance who they're meeting with and don't want to be surprised.
- **Provide a time frame of your availability.** "We're available on May 19, anytime after 10:00 a.m.," or "the best time to meet would be 2:00 p.m., but if that doesn't work for you, we'll try to find another time that does."

If you get voice mail: Leave a truncated version of the same information. Speak clearly and keep it brief.

Example: *"Hi, this is Janet Dosler calling from the Reclaiming Futures program in Santa Cruz. I'm following up on an emailed request I sent over on April 24 to schedule a meeting with Senator Feinstein. Reclaiming Futures Santa Cruz is promoting new opportunities in juvenile justice by bringing communities together to improve drug and alcohol treatment, expand and coordinate services, and find jobs and volunteer work for young people in trouble with the law. I will be in Washington, D.C., on May 14 and want to personally thank the Senator for her letter of support for our recent grant application and update her on some exciting new work we are starting."*

STEP 4: FOLLOW UP

If you haven't heard from the office after leaving a voice mail, wait two to three days before calling back again. If you get their voice mail again, leave another message. Schedulers are obviously very busy and constantly fielding a number of calls every day from different organizations, so don't expect that they'll always remember you called or get back to you very quickly. Stay persistent (yet always polite). It is very common to make several calls before successfully scheduling a meeting.

STEP 5: CONFIRM THE MEETING

Once the meeting time is set, email a confirmation message with the meeting date and time, attendees, and your cell phone number for any last-minute scheduling changes. It's also a good idea to call or email the office a day or two before your meeting to confirm the appointment.

IF YOU GET DIRECTED TO STAFF OR WOULD LIKE TO SCHEDULE A MEETING WITH A SPECIFIC STAFF PERSON:

Keep in mind that every member of Congress has an incredibly full schedule. The scheduler may tell you that the member will be unable to meet with you and refer you to the staff person in the office who handles your issue. ***Do not be disappointed***. Much of the work of Congress is accomplished by staff members. They generally have a bit more time available to hear about your work and will often know your subject better. Once referred to the appropriate staff person–typically the member's health legislative assistant–follow the same steps for arranging a meeting outlined above (but skip the scheduler and deal with the staff person directly).

In many cases, you might want to schedule your meeting directly with a staff person without trying for a meeting with the member of Congress. Especially if you already know the staff person you would like to meet with, or if your ask is directed toward staff, you may want to request a staff-level meeting right off the bat.

KEEP IN TOUCH WITH THE CONNECT TEAM!

Update us on developments in the opportunities you discussed during your meetings. Let us know at *connect@rwjf.org* about your upcoming events or successes you accomplish due to the **Connect** training, and let us be a resource for you as you continue to build your relationships.

Sample Meeting Request Letter

Put on your project's letterhead

RECLAIMING FUTURES
SANTA CRUZ COUNTY
Communities helping teens overcome drugs, alcohol and crime

April 24, 2012

Letters addressed to members of Congress in Washington, D.C., need only include the member's name, chamber, city and 9-digit ZIP code.

The Honorable Dianne Feinstein
United States Senate
Washington, DC 20510-0504
VIA Fax: (202) 555-5555

Fax and email the letter to the Congress member's scheduler.

Dear Senator Feinstein:

Put the dates you will be in Washington and the name of your program in the opening paragraph.

On May 19, the *Reclaiming Futures* program in Santa Cruz County will be in Washington, D.C., to highlight their work to help teens caught in the cycle of drugs, alcohol and crime.

Use formatting such as bulleting and bolding to make your request clear.

In the second paragraph, give the names and titles of the people from the project attending the meeting and the specific times you are available.

We would like to request a meeting with you to discuss our program. We would be available to meet with you at any time on Wednesday, May 19, after 10:00 a.m. Participants at the meeting would include Judy Winston, Deputy Director for Programs, and myself.

Provide background information on your work—explain how it works and specifically who it serves.

As many as four in five teens in trouble with the law are abusing drugs and alcohol, and yet many of them receive no treatment for the substance abuse problems that helped put them in the juvenile justice system. Research shows that treating substance abuse reduces crime, saves money, and builds safer communities.

Put your work into a national context, if appropriate. Mentioning your funders may be a good way to show that you've achieved wide recognition for your work.

Reclaiming Futures Santa Cruz County is one of just 10 pilot projects across the country being funded by the Robert Wood Johnson Foundation to promote new opportunities and standards of care in juvenile justice. By bringing together courts, police, detention facilities, treatment counselors, businesses, schools, faith-based organizations and families, they are providing teens with greater treatment opportunities and reinventing how communities work with troubled youth. And it's working: teens with this strong network of community support are far less likely to return to substance abuse and criminal behavior.

We look forward to the opportunity to sit down with you to share our lessons learned. To schedule a time for the meeting, please contact me directly at (555) 555-5555 or email janet@myorganization.org

Sincerely,

Janet Bajrumask
Director

P. O. Box 1812, Santa Cruz, CA 95061-1812 | T (831) 454.3886 | F (831) 454.3879 | www.reclaimingfutures.org
A project of Reclaiming Futures, a national program of The Robert Wood Johnson Foundation®

Notes

Robert Wood Johnson
Foundation

Route 1 and College Road East
Post Office Box 2316
Princeton, NJ 08543-2316
www.rwjf.org

2012