



American
Occupational Therapy
Association

Conducting a Congressional Meeting

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Before Your Meeting

- **Preparation is key** to being comfortable in your meeting
- **Review AOTA provided materials** and ask questions if you don't understand something
- **Know who your elected officials are.** You are their constituent and the person they are most interested in speaking with.
- **Bonus:** Research their policy interests and backgrounds ahead of time to see if there is an intersection with OT
- **Use the app to communicate with your group to identify who in your group is speaking ahead of time.**

Important information



Use AOTA provided talking points



Only attend meetings that you have been assigned to



If your group includes non-constituents, identify who is from the district

Meeting Pointers - Introductions

- **Introductions – Small Group:**

- Each person can introduce themselves and their workplace or university
- It is always appropriate to give a quick connection to the district

- **Introductions – Large Group:**

- Have a representative from each group introduce that group
- Also make a connection to the district
- Identify the constituent if not everyone is from the district

Meeting Pointers

- **Introducing OT**

- Ask: “Are you familiar with occupational therapy?”

- **Key Legislative Issues**

- Choose the legislative issue you are most comfortable with to begin
- Use examples where relevant, if you have them, and if they make sense to the discussion
- What is your ASK?

- **Conclusion**

- Offer yourself, or AOTA as resource
- Thank them for their time
- Ask them the best way to follow up

Meeting Pointers

You are the expert on occupational therapy

- It is okay if you are not the expert on the policies
- It is okay if you don't know the full ins and outs of the Congressional process
- Staff should treat you with respect

Be an honest broker

- Your credibility is *extremely important*;
- It's okay if you don't know the answer;
 - Practice "I'm not sure, but I will find out for you"
 - Let us know through the app if there are questions for us to follow up with

AOTA Provided Materials

- **Purpose:**
 - Provide structure and support for your Hill meetings
 - Equip you with key materials to hand to staff
- **What's Inside the folder?**
 - “One-Pagers” on each of the issues to be discussed
- **What's Not Inside?**
 - Meeting Notes/Talking Points

AOTA Provided Materials

One folder per meeting

Someone will be assigned to pick the folder up

All “leave behinds” are in the app and can be emailed – don’t panic if you don’t have a folder

All materials were sent to the office ahead of time

After Your Meeting

- **Fill out the questionnaire in the advocacy app**
 - This helps AOTA know which offices to follow up with.
- **Add any meeting notes for your own information**
 - This can help you if you return next year, and to remember key details of the meeting
- **Write a quick, brief thank you note**
 - You can use the app for this, it does not have to have an ask
- **Follow up based on their suggested timing**
 - Set a reminder to send a follow-up email, this one include an ask!
- **Maintain patience and always be polite**

Things that May Surprise You

- **Youthful Staffers:**

- Many staffers are early in their careers but serve as trusted advisors to Members of Congress.

- **Meeting Location:**

- Meeting space in Congressional offices is small. You may be very crowded or meet in nontraditional rooms like hallways or the cafeteria.

- **Interruption by Member of Congress:**

- Sometimes your Representative or Senator may join late

- **Meeting Length:**

- Meetings will be 15-20 minutes, so it is important to be clear and concise.

Review



Introduce yourself or your group; Identify the constituents



Introduce occupational therapy before getting into the issues



Use AOTA's talking points



Be sure to make the “ask”.



Ask when and how to follow up with them



Offer yourself as a resource



Say “Thank You!”



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