

## How to Set Up a Congressional Meeting

### 1. Identify your Members of Congress

Go to [www.aota.org](http://www.aota.org) and click on the AOTA Legislative Action Center (located on the main page of the website) in order to identify your legislators, which includes 1 Representative and 2 Senators. Once on the Legislative Action Center, type in your zip code and click search. Note: you may be required to type in the additional 4 digit extension. When your legislators are on display, you can click on “info” beneath their name to reveal each individual profile. Once on the profiles, you are able to view your legislator’s biography, gather contact information, view Committee assignments, identify specific staff members, view co-sponsorship of bills related to occupational therapy, and view contributions from various Political Action Committees (PAC’s).



### 2. Gather Contact Information

If you intend to meet with your legislator at the local office, click the “Contact” tab to view the district office contact information. If you are scheduling a meeting with your legislator at the Washington D.C. location, click the “bio” tab then click “Visit Official Website” link to find the office phone number from the legislator’s webpage.

### 3. Identify Appropriate Staff

***When scheduling a meeting, start by assuming that you are trying to schedule a meeting with the Congressman or Senator. But this is not always possible and you may be directed quickly to the staff who handles health care, Medicare, or education issues. This staff is very important and they have the ear of their boss. Typically schedulers will handle meeting requests for the Member of Congress and staff will schedule their own meetings. Sometimes the scheduler will help with both. The office should let you know the best person to work with.***

Once you have the office phone number, call to identify the specific staff with whom you should work to schedule a meeting. When you call the office, be sure to highlight the relationship you have with the legislator’s district or state such as emphasizing work residence, home residence, previous home residences, school residence, etc. as it relates to the Member of Congress.

#### Example:

“Hello, my name is (Name) and I am an (occupational therapist/ occupational therapy assistant/occupational therapy student) from (City/State). I am going to be in Washington, DC on (date) and am interested in setting up a meeting with (Congressman/Senator name) or the appropriate staff member. Can you tell me who the best point of contact would be? Do they have a preferred way to handle meeting requests?”

If they give you the name of the scheduler as your first point of contact, you should follow up and ask:

“Can you also tell me who in the office handles health care issues?”

#### 4. **Make the Meeting Request**

After you have identified the correct contact person, proceed to contact the office the way the staff person told you to proceed. You may be required to call, email, or fax to set up the meeting. (See meeting request form which can be faxed or e-mailed.) The best way to contact the staff person, unless directed otherwise by the office, is to contact them by phone then follow up with an email. You may be required to leave a voicemail.

Example:

Message with Scheduler to schedule a meeting with Congressman or Senator

“Hello, my name is (Name) and I am an (*occupational therapist/ occupational therapy assistant/occupational therapy student*) from (City/State). I am going to be in Washington, DC on (date) and am interested in setting up a meeting with (*Congressman/Senator name*) to discuss some issues important to occupational therapy professionals and the people we serve.”

Message with Health Care Staff to schedule a meeting with them

“Hello, my name is (Name) and I am an (*occupational therapist/ occupational therapy assistant/occupational therapy student*) from (City/State). I am going to be in Washington, DC on (date) and was interested in setting up a meeting with you to discuss some issues important to occupational therapy professionals and the people we serve.”

### **If you leave a message, be sure to give them your name, e-mail and phone number!**

After you place a phone call to the office to set up the appointment, follow-up with an e-mail so the office has your meeting request in writing. Include the same information as above, and mention you are following up on a voice message that you left them.

#### 5. Follow-Up

Remember, the process of setting up a meeting and finalizing it may take up to a week or longer as Congressional staff is extremely busy. If you do not hear back from the office within a week, it is appropriate to call again or send an additional e-mail.

Example:

“Hello, my name is (Name) and I recently contacted you about setting up a meeting in (Location) on (Date) and I just wanted to follow-up on that request. Please let me know when you have any further information. Thank you very much for your time and I hope to hear back from you soon.”

Even after meetings are finalized, changes can occur. If this happens, do not be disheartened. Capitol Hill staff typically do their best to reschedule your meetings.

## 6. Helpful Tip

If you are given a name and no e-mail you can usually figure out the e-mail address by following the pattern below. However, it is best to ask for the specific e-mail address to avoid issues with spelling or nicknames.

### Typical Email Addresses:

House Staff E-mail Address

firstname.lastname@mail.house.gov

Example:

Joe Smith with Representative Jones  
joe.smith@mail.house.gov

Senate Staff E-mail Address

firstname\_lastname@membersname.senate.gov

Example:

Jane Smith with Senator White  
jane\_smith@white.senate.gov