



CONGRESSIONAL DISTRICT MEETING RESOURCE GUIDE

Overview

Meeting with your United States Senators or Representative back home is a great way to build relationships with your elected officials while demonstrating the importance of the health information profession to their state or congressional district.

Whether meeting with your elected officials in their congressional offices back home or through a tour of an HIM department, you are provided with an opportunity to highlight the important, transformative work you are doing while talking to your member of Congress about AHIMA's federal priorities. These types of interactions help make you a resource on matters related to HIM and foster stronger ties with your elected officials.

It may seem daunting to meet with a member of Congress. But when you reach out to your Congressional leaders, you will find that you have more influence than you ever realized. Your legislators want to hear from their constituents about the issues you are facing within the district, your state, and around the country.

This guide will assist you in preparing for a successful visit with your federal legislators back home.

If you need additional guidance on contacting your members of Congress or assistance in putting together materials for the visit, contact us at advocacy@ahima.org.



Identifying Your Elected Officials

To become an effective advocate, you must become familiar with your members of Congress, including who they are, what committees they sit on, and their positions and voting records on matters related to health information. You can identify your federally elected officials and access their office contact information in the [AHIMA Advocacy Action Center](#).

Requesting a Meeting in a District Office

Once you have identified your elected officials and located their office contact information, call the office and ask who you should send a meeting invitation to for an in-district meeting. This will often be a district scheduler. Make sure to get their email address, and you are ready to begin drafting your meeting request.

PRO TIP #1: District Work Periods

Members of Congress have several “district work periods” throughout year when they travel back to their state or congressional district to meet with constituents back home. Oftentimes, this means members of Congress can be found working in their local offices in August and around federal holidays. Mondays and Fridays are also ideal times to request a meeting with your elected official when Congress is in session as most members of Congress are in Washington Tuesdays, Wednesdays and Thursdays. Requesting a meeting during these times may increase the chance of meeting with your elected officials and their staff. Keep in mind that the House and Senate district work periods do not always coincide, so it is important to check both schedules before you request a meeting. The House calendar can be found [here](#) and the Senate calendar can be found [here](#).

What details should my meeting request to my Member of Congress include?

Your meeting request should explain who you are, the purpose of your visit, the names of the constituents that will be present for the meeting, and possible meeting dates. It is important to be flexible with your schedule! The more flexible you are with the date and time of the meeting, the greater the chances that your meeting will be accommodated. It is also important that you make sure to request your meeting **at least one month in advance** to ensure ample time for scheduling. A meeting request template can be found in [Appendix A](#).

PRO TIP #2: Requesting a Meeting

Many congressional offices are increasingly asking constituents to fill out a meeting request form on their congressional websites or to send their requests to an email address specifically meant for meeting requests. Before you begin crafting a meeting request, make sure to visit your members of Congress's official congressional website to determine whether you need to submit a meeting request form online.

If you do not hear back from congressional staff after one week, follow-up via email or phone to ensure that they received the request.

Once you have scheduled a meeting, reach out to AHIMA's Policy and Government Affairs team at advocacy@ahima.org to let them know when and where you have appointments.

PRO TIP #3: What if My Member of Congress is Unavailable to Meet With Me?!

In most instances, offices will propose that you meet with one of their staffers instead of the US Representative or US Senator. If this option is not presented, you should ask if it is a possibility. Meeting with congressional staff is just as valuable as meeting with the member of Congress. It helps build your relationship with the office and is an opportunity to educate staff on the issues that AHIMA cares about.

If you end up meeting with or hosting staffers, treat them with the same level of respect and gratitude as you would a member of Congress—remember they are taking time from their busy schedules to meet and they have the ability to exert considerable influence on their boss to advance the issues you care about.

You should confirm your appointment with your member of Congress's staff **at least one week prior to the scheduled meeting date**. Members of Congress's schedules can change quickly, so confirming the details of the meeting is highly recommended.

Preparing for a District Meeting

AHIMA's Government Affairs team will assist in developing the "ask" for the member of Congress and in developing the key message statements for your visit. Contact AHIMA's Policy and Government Affairs team at advocacy@ahima.org for assistance.

PRO TIP #4: Getting To Know Your Members of Congress

When meeting with your members of Congress, the chances of a successful outcome increase when you have a good sense of the person you are trying to influence. This will help you develop the best approach with them, and may help you avoid any pitfalls. To learn about your elected officials before your meeting, start by looking at their official congressional website, which generally contains biographical information, press releases, a section on policy issues of particular interest to them, and information about their committee assignments. Congressional websites also frequently include information on legislation that the US Senator or US Representative has sponsored or cosponsored. A web search of major state or local newspapers for any media coverage is also helpful. Also consider reviewing the Member of Congress's congressional Facebook page and Twitter account to view recent statements or issues of interest to them.

Before Your Meeting

Connect with the other AHIMA members who will be in your meetings. Plan out your strategy – who is going to cover which talking points, who will kick off the meeting, and who has stories that may bolster the issues covered.

Study the talking points and materials provided by AHIMA, especially the sections you have volunteered to cover.

Prepare your stories from your on-the-ground experiences in healthcare to illustrate the importance of the issues being covered in the meeting.

Research your member of Congress through their congressional website and social media pages. Do they have a healthcare background? Have they told stories in the past that may relate to the issues being discussed? Are they already a cosponsor of the bill you're discussing? Frame your messaging with these questions in mind.

Review the Advocacy Training Modules. Our [Advocacy Training Modules](#) on Vimeo will help you understand the legislative process, how congressional meetings are conducted, and how to use social media in your grassroots efforts. All advocacy leaders should view these videos.

Conducting a Meeting

Meeting with congressional offices, whether virtually or in person, is one of the best ways to ensure that your voice is heard in the legislative process. Preparing for the format and flow of these congressional meetings is important for the effective communication of your message. See Appendix B for an example of how a congressional meeting can be conducted.

In congressional meetings, **you should:**

Stick to your plan. Identify one person to lead the meeting or kick it off. Know which members of your group are going to cover which talking points. Map out your strategy ahead of time.

Introduce yourself. Be prepared to give a 1-2 sentence introduction of yourself, including your name, where you live (within the Member of Congress' state or district), and where you work.

Make a connection with the staffer. Ask how they are doing or find a geographical connection if they are from the district. Ask if they have familiarity with the issues you are there to discuss. Thank them for meeting with you. Keep this brief.

Stay on topic. Know which pieces of legislation you are there to discuss, and don't stray off topic, especially to issues not related to health information.

Know your ask. Make sure you know what you are asking the congressional office to do (generally, support or oppose a piece of legislation), and make sure they leave the meeting knowing what your ask is.

Come prepared. Have your personal story drafted and come with any numbers and statistics that bolster your arguments, especially if those numbers are from your district or state.

Be respectful of the group. You may be with other AHIMA members. Work to ensure that every member gets to participate in the meeting, and do not dominate the conversation.

Leave time for questions. In a 30-minute meeting, leave at least 10 minutes for the staffer to ask questions.

Follow up. Offer to send materials to the staffer after the meeting and identify one person from the group to email a thank-you and the materials to the staffer.

In congressional meetings, **you should NOT:**

Get political. The member of Congress is your representative at the federal level, regardless of who you voted for. To ensure your Representative or Senator is representing your policy preferences, you must rely on effective communication and persuasive arguments. Now is not the time to bring up elections, campaign contributions, or other issues.

Expect to meet with the member of Congress. Most meetings are handled by congressional staff. Even if you are scheduled to meet with the actual Representative or Senator, a schedule change could occur at the last minute. Members of Congress rely on their staff to recommend courses of action, so your focus should be on persuading the staffer of the merits of your argument.

Assume prior knowledge. Staffers are expected to cover a number of wide-ranging issues. Don't assume the staffer knows the background of a bill or issue without asking.

Make up an answer. A staffer may have a question to which you don't know the answer. That's fine! You can always mention what you do know about the topic, and then say you will look into getting them the information they requested.

Following Up After the Meeting

Assign one person in the meeting to send a follow up/thank-you email to the office to thank them for their time, provide any additional information the staffer requested during the meeting, and include the participants' contact information.

Promote the meeting through social media. If you can, get a picture with the member and/or staffer to use in a social media post that can include a thank you to the member of Congress's account for meeting.

Log your interaction. In the [AHIMA Action Center](#), there is an option to "Log Interaction." The meeting lead should fill out this form. Tag any officials, staffers, or AHIMA members who were part of the meeting (if unavailable in the search bar, include them in the Notes section), select the type of interaction (Meeting); select the date, time, and duration of the meeting; include any notes taken about the meeting, including follow up needed, and select the Related Issues the meeting touched on (such as patient identification and matching, telehealth, health equity, etc).

Don't treat this as a once-a-year opportunity to connect with your congressional delegation. Should a congressional staffer be interested in your on-the-ground reports or numbers, offer to be a resource throughout the year.

Maintaining HIM Advocacy

Once you have developed a rapport with your members of Congress and their staff, consider building a stronger relationship by:

- ◇ Offering to host a site visit by your lawmaker to your organization or HIM department to educate them further about the work of HIM professionals.
- ◇ Attend the lawmaker's local events including open houses or town hall meetings.
- ◇ Continuing to contact your legislator through the [AHIMA Action Center](#) on key legislative priorities.
- ◇ Attending the AHIMA Advocacy Summit and visit with your member of Congress in Washington, DC.

PRO TIP #5:

- ◇ Dress professionally, as you are representing your CSA and AHIMA.
- ◇ Bring your business card(s) to share with congressional staff (see additional resources section for a sample business card template).
- ◇ Do not over-stay your scheduled time.
- ◇ At the end thank the member of Congress and staff for their time and let them know you will follow-up.
- ◇ Make sure to put your best foot forward. **A good first impression is a lasting impression.**

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Congressional Visit Checklist

Identifying Your Elected Official

- ◇ Identify your member of Congress via the [AHIMA Advocacy Action Center](#).

Requesting a Meeting in a District Office

- ◇ Obtain contact information for your member of Congress's district and/or state office.
- ◇ Call district and/or state office to confirm appropriate point of contact for scheduling of the meeting.
- ◇ Develop meeting request (see Appendix A). Request the meeting at least one month in advance.
- ◇ Follow-up with congressional staff at least one week after sending meeting invite to confirm receipt. Follow-up can be done via email or phone.
- ◇ Once the meeting is scheduled, reach out to the AHIMA Policy and Government Affairs team at advocacy@ahima.org for assistance with talking points, handouts, and additional material for the meeting.
- ◇ Confirm appointment with congressional staff at least one week prior to the meeting.

Planning for Your Meeting

- ◇ View the AHIMA [Advocacy Training Modules on Vimeo](#).
- ◇ Develop a one-page summary about your CSA, its members, and academic HI programs in your state.
- ◇ Familiarize yourself all materials provided by the AHIMA Policy and Government Affairs team, including the one-page backgrounder.
- ◇ Research your member of Congress.
- ◇ Connect with other AHIMA members in your meeting and create the meeting strategy (assign talking points, have your on-the-ground stories ready, etc.)

- ◇ Develop and finalize meeting agenda.

Meeting Follow-up

- ◇ Send thank-you emails to member of Congress and staff one to three days following the meeting.
- ◇ Use social media to promote photos from the meeting.
- ◇ Share photos with the AHIMA Policy and Government Affairs team so they can promote the meeting as well.
- ◇ Provide a summary of the meeting to your CSA Board of Directors and/or Executive Director/Central Office Coordinator.
- ◇ Log your meeting in the [AHIMA Action Center](#) “Log Interaction” area.

Maintaining HI Advocacy

- ◇ Offer to host a site visit to your organization or HIM department.
- ◇ Attend your member of Congress’s local events, including open houses and town hall meetings.
- ◇ Continue to contact your member of Congress via the AHIMA Advocacy Action Center on key legislative priorities.
- ◇ Attend the [AHIMA Advocacy Summit](#), where you can visit your elected officials in Washington, DC.

In-District/In-State Meeting Request Template

[ON YOUR STATE CSA LETTERHEAD]

Date

The Honorable **[Name of US Senator/US Representative]**

Attn: **[Scheduler's Name]**

[Office Address]

Dear **[Senator/Representative] [Name]**:

I am writing to request time to meet with you and your staff in your **[insert state/district office location] [date(s) requested for meeting]** to discuss **[insert specific federal issue or federal policy concern]**.

[Name of CSA] is a component state association of the American Health Information Management Association (AHIMA). Representing **[insert CSA membership number]** health information (HI) professionals across **[insert state]**, **[insert CSA name]** is dedicated to promoting and advocating for best practices and effective standards in health information. I have included here a brief fact sheet with more details about AHIMA, our national association.

Attendees for the meeting will be:

[Name of attendee, City, ST]

[Name of attendee, City, ST]

[Name of attendee, City, ST]

[Name of attendee, City, ST]

We look forward to the opportunity to meet with you in person to share information about the work that HI professionals do to empower people to impact health. We are flexible on both the time and place of the meeting, based on your schedule. I will follow-up with your scheduler in a few days to discuss further. In the meantime, should you have any questions or if I can be of service, please do not hesitate to contact me at your convenience at **[your phone number]** or **[email address]**.

Sincerely,

[Name]

[CSA Position]

[CSA Name]

Appendix B:

Congressional Meeting Example

AHIMA Member 1: Thank you so much for meeting with us today, and we hope you're doing well. We are a component state association of the American Health Information Management Association, a global nonprofit association of health information professionals. AHIMA represents professionals who work with health data for more than one billion patient visits each year. We'd like to start off with introductions. My name is [name], and I'm from [City, State], and work as a [position] for [employer]. [The meeting leader should then go around and call on the rest of the attendees to introduce themselves.]

AHIMA Members 2-5: Give their introductions.

AHIMA Member 1: We're here today to discuss the issue of [issue] and how it relates to health information, and to specifically talk about [bill number]. Can I ask if you are familiar with this legislation, or can I offer some background?

Staffer: I'm vaguely familiar, but some background would definitely help.

AHIMA Member 1: Great, [AHIMA Member 2 and 3] can provide background on the issue.

AHIMA Member 2: The piece of legislation we're here to discuss is [number and title of bill]. What this bill would do is [go over talking points provided on what is included in the bill].

AHIMA Member 3: This issue is important to AHIMA members because [go over talking points on impact on health information. Include numbers and statistics here].

AHIMA Member 1: While we have seen these issues play out across the US this year, we have also experienced them in [district/state]. [AHIMA Members 4 and 5] have some on the ground stories of how they have seen these issues play out over the last year.

AHIMA Member 4: [Tells personal story.]

AHIMA Member 5: [Tells personal story.]

AHIMA Member 1: We would love for your office to support this piece of legislation. What questions do you have for us on this topic or related to what is going on in your district?

Staffer: [Will likely pose 2-3 questions. If the group can answer them, do so at that time, or say that you will follow up with the answer after the meeting.]

AHIMA Member 1: If you don't have any further questions, can I ask if you think your office would be willing to support this request? Is there anything we can provide to help you support our ask?

Staffer: [Will answer yes/no/they will present the ask to the member of Congress, etc.]

AHIMA Member 1: Thank you so much for your time today. We will follow up with the information you requested, and please don't hesitate to reach out to us or AHIMA as a resource on anything related to health information.

About AHIMA

The American Health Information Management Association (AHIMA) is a global nonprofit association of health information (HI) professionals. AHIMA represents professionals who work with health data for more than one billion patient visits each year. Our mission of empowering people to impact health drives our members and credentialed HI professionals to ensure that health information is accurate, complete, and available to patients and clinicians. Our leaders work at the intersection of healthcare, technology, and business, and are found in data integrity and information privacy job functions worldwide.

Leadership in Health Information

Health information management is a worldwide profession of educated, trained, and certified professionals who serve as stewards of health information. For over 90 years, AHIMA has been dedicated to the ethical and responsible use of health data. This commitment to the confidentiality, privacy, and security of an individual's health information, as well as to ensuring the accessibility and integrity of that information, is reflected in the [AHIMA Code of Ethics](#) to which our members are deeply committed and live out in their professional lives every day.

AHIMA members are active leaders in health information technology (HIT) and health information initiatives, including electronic health record (EHR) implementation; health information exchange; protecting the privacy and security of health information; facilitating consumer access to their health information; data quality and integrity; and workforce development.

Appendix D:

Thank You Note Template

Date

Senator/Representative

Address

Washington, DC, ZIP Code

Dear **Name**:

I want to take this opportunity to thank you for taking the time to meet with me **[and my colleagues]** on **[date]**, to discuss the health information management (HIM) profession and health information challenges facing our nation.

The issues we discussed – **[insert topic(s)]** – are critically important and complex—but not beyond our reach to solve.

If I can ever be of assistance on any HIM-related matters, please feel free to contact me at **[your number]** or **[your email]**. You can also contact the AHIMA director of Government Affairs, Kate McFadyen, in the AHIMA Washington, DC, office at (202) 480-6058 or at kate.mcfadyen@ahima.org.

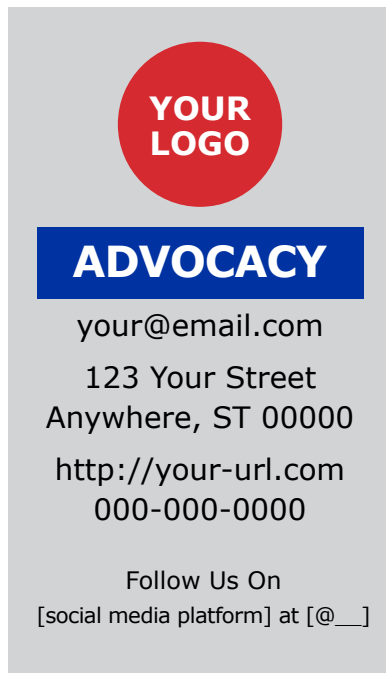
Again, thank you for taking the time to meet with **[me or us]**. I wish you all the best with the important challenges ahead.

Sincerely,

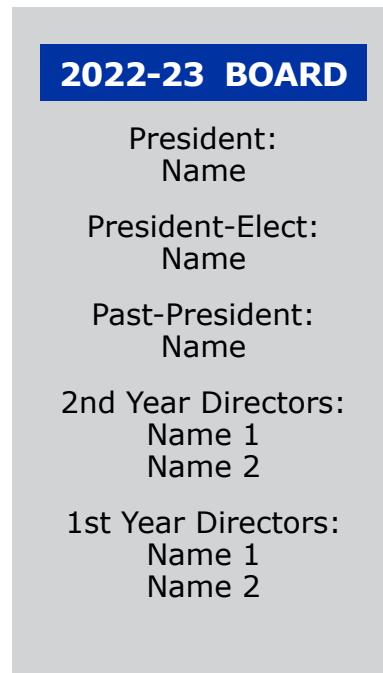
[Name]

[CSA Position]

Business Card Template



FRONT



BACK

Appendix F:

Additional Resources

To learn more about our current advocacy efforts, visit the [AHIMA Advocacy Action Center](#).

To connect with others, visit the [Advocacy Leaders Access community](#).

For additional training in advocacy, visit the [AHIMA Advocacy Modules](#).

For general questions about an Advocacy at AHIMA, email us at advocacy@ahima.org.