

**The AMS Policy Program
Guide to Policy Engagement**

Introduction

This document offers guidance for scientists looking to engage with the U.S. policy process. While this guide largely focuses on engagement at the federal level, many of these insights and recommendations may also be applicable at the state or local levels.

The science-policy interface is complex and can seem intimidating or even nonsensical at times. However, the policy realm operates via an established set of procedures and systems and rewards those who take the time to understand the process. This process is one in which participation from the scientific community has the potential to be highly impactful. As a scientist, the analytical capabilities, technical knowledge, and problem-solving skills you have gained from your training are both atypical and valuable in a policy setting.

Most importantly, sustained, thoughtful engagement with the policy process allows for the formation of trusted relationships between scientists and decision makers. By providing subject matter expertise and opinions informed by scientific evidence (and recognizing the limits of that expertise), you can help policymakers ground societal decisions in the best available knowledge and understanding. This in turn has the potential to enhance scientific innovation and the societal benefits of science.

Know Your Audience

What information you hope to communicate and how best to communicate that information depends on your audience. Therefore, understanding your audience should form the foundation of your communications approach.

Who are they and how do they fit within the policy process?

What are their interests and needs?

Who do they serve (whose needs are their responsibility) and who do they answer to?

What do they care about?

How does your information (or what you hope they will do—see next section) relate to them (i.e., the previous questions)?

Your target audience may be elected officials and their personal staff, legislative committee staff, those who work within federal agencies, or others. All will have unique backgrounds, expertise, priorities, and jurisdictions that you should take into account in order to get the most from your outreach.

Congressional Offices

The U.S. Senate and House of Representatives

The U.S. Congress consists of two chambers: the Senate and the House of Representatives. Each member of Congress has their own personal office and staff members (“staffers”). The allowance for staff salaries is equal across House offices, while in the Senate, this allowance is determined by state population with offices representing more populous states receiving more funding.

Local and D.C. Offices

Each member of Congress has an office in Washington D.C. as well as at least one office in their home district or state. Offices in Washington tend to be more legislation and budget focused, while local offices tend to handle constituent services. Depending on the goal of your outreach, you may prefer to contact one office over another.

Congressional Committees

Congressional committee and subcommittee activities are a key mechanism through which Members influence policy. A primary function of committees is to consider legislation that falls into their jurisdiction. Bills may be referred to or discharged from a committee by the full chamber. Committees can offer, debate, and vote on amendments to a measure during the markup process and may report legislation out to the full

chamber or report an original bill. Committees may also hold hearings to gain information on a particular topic. Subcommittees, which consist of a subset of members from the full committee, focus on specific issues which fall under the committee's jurisdiction and can markup bills for consideration by the full committee. Each Congressional committee employs its own professional staff.

Committees can intersect with scientific research and funding in multiple ways. Certain committees have oversight over federal agency activities and authorization bills that direct agency activities. Individual issues, such as energy or oceans, may span multiple committees.

Additionally, the House and Senate each have an Appropriations Committee, which is responsible for considering the allocation of funding. While a program can be authorized by Congress, there is no guarantee that it will receive the funding to be implemented during the appropriations process. Funding for scientific research may fall under the jurisdiction of one of several appropriations subcommittees.

Visit <https://www.congress.gov/committees> to view a list of current committees and their memberships.

Researching Representatives

When reaching out to members of Congress, understanding the Member's professional and personal interests, values, and priorities is important to developing an effective communications approach.

Check out legislators' websites for information on their background, party affiliation, positions, and priorities. These priorities almost certainly relate to the needs, interests, and values of their constituents (elected officials tend not to last long otherwise). Members' social media pages may also provide insights into their interests and activities. A search for recent news items on the Member can also be valuable.

If you need help finding your Senators or Representative, visit: www.USA.gov/elected-officials

Visit www.congress.gov to explore your representatives' recent votes along with bills they have introduced, sponsored, or co-sponsored.

Key questions to consider while researching:

- What issues (e.g., cultural or economic interests) are important to the state or district?
- How does science relate to those issues?

- What committees does the Member serve on? Are they a member of any caucuses?
- Does the Member have specific science-related priorities?

Communication with personal offices will likely be with a staff member whose portfolio includes your issue. Being directed to a staff member does not mean that your concern is not being taken seriously; staffers are in constant communication with their Member and will relay information or issues from your conversation back to them. While elected officials generally need to focus on a wide range of issues, staffers specialize more narrowly in particular areas and possess more subject matter familiarity, at least with respect to policy decisions relating to their areas of focus. Additional research into the background of the relevant staffer will therefore be valuable as well.

Know Your Objective

There are three broad reasons why scientists may wish to engage with policy makers:

- 1) to advance science (i.e., related to investments in science or the practice of science),
- 2) to promote the use of science in decision-making
- 3) to advance particular policy positions informed by (but that go beyond) science

It is important to keep your objective in mind as you prepare to reach out. Trying to do too much in one call or visit may dilute the message.

Message and Ask

In order to increase your persuasiveness and effectiveness when communicating with policymakers, come prepared with a clear ask and a compelling message that is tailored to your audience.

Your **ask** is the ultimate purpose of your outreach. What do you want the individual to do? The ask should be specific, actionable, within the capabilities of the office, and coherent with their needs, interests, and values. For example, a legislator may co-sponsor legislation, offer an amendment to legislation, or hold a committee hearing.

Your **message** provides supporting evidence for your ask. It should convey why the ask is important, not only to you but to the Member. Keep your message straightforward, to the point, and emphasize the relevance to the Member's state or district. Personal stories or specific data can help make your message more memorable and impactful.

Think of your ask as falling on two spectra: one of its difficulty and one of its importance. If your ask is trivial to the member and very meaningful to you, then it will be a relatively easy for the member to say yes. If it is difficult (or painful) for the member (e.g., because it will turn away their voters) and offers trivial benefits to you (or others), then you might want to consider developing a different ask.

Statements from authoritative scientific organizations (such as AMS) may be helpful in crafting your message or in providing information. AMS members are encouraged to deliver messages consistent with [AMS statements](#), which have been developed by subject matter experts, reviewed by independent scientists, and adopted by the full AMS Council. However, when speaking for themselves as individuals, members are not required to deliver any particular message and are always free to express dissenting views that reflect their personal opinions. Care is needed when you might be viewed as speaking on behalf of AMS. In such cases, it is important to attribute your personal views to yourself and not to AMS.

Message and Ask worksheet

1. What is the issue I want to discuss with the policymaker?
2. How does this issue impact the policymaker and their constituents?
 - a.
 - b.
3. What is one clear example (personal story or relevant statistic) that explains the importance of this issue?
4. How would acting on my issue help the policymaker advance their own priorities?
5. As a result of this meeting, I want the policymaker to ____ (my ask):
For example: co-sponsor a piece of legislation relating to the issue
6. Is my ask specific and appropriate for the policymaker? How will I know if my request has been carried out?
7. Sum it up: What am I asking for, what is the overall issue, and why does it matter to my state/district and to the policymaker's agenda? (Describe in 5 sentences or less)

Know the Process

Leaving a message via phone, email, or letter

- Provide your name and the general area where you live. Mention that you are a constituent of the Senator/Representative.
- The reason that you are calling/writing, for example:
 - To discuss the importance of federal science funding
 - To discuss the value of Earth science research to the state/district
 - To express concern/support regarding a specific piece of legislation
- Information to support your message. Why should the Member care?
- What you would like the Member to do.
- Thank the listener/reader for their time and consideration of your message.

Prefer to call after hours? You can leave a voicemail message.

Requesting a meeting

Members may have a staff directory available on their website. If not, call their office and ask for the name of the staff member who handles issues relating to your topic of interest (e.g., science) so that you can schedule a meeting. Depending on your location, you may ask for a meeting at the Member's local office, Washington D.C. office, or virtually. Some job titles you may see: Legislative Director, Legislative Aide/Legislative Assistant, or Legislative Correspondent.

Follow up via email using the standard House and Senate email formats:

- House: `firstname.lastname@mail.house.gov`
- Senate: `firstname_lastname@senatorlastname.senate.gov`

Keep your request brief, including:

- That you are a constituent of the Senator/Representative
- Your position or work
- The issue you'd like to discuss
- Preferred meeting date and time
- If you would like an in-person or virtual meeting
- If you will be bringing others to the meeting

When determining meeting dates, check the [Congressional calendars](#) to see if the House and/or Senate is in session, as this may affect staffer availability. It is also helpful to have an understanding of any legislation that currently is being worked on—staff may

not be available to meet while major legislation is being worked on or may be particularly eager to meet if your issue is one that has bearing on current discussions.

Meetings with committee staff can be arranged directly with the staff member. General contact information for each committee is available on their individual websites.

Meeting structure

A typical Hill meeting follows this structure:

1. Exchange business cards and briefly introduce yourself.
2. Thank the staffer for their time and acknowledge any recent positive actions by the lawmaker.
3. Clearly state your ask.
4. Explain why your request matters and why they should care.
5. Listen to their response and answer questions. Ask questions of your own.
6. Provide any leave-behind material and close by thanking them again.

Developing a leave-behind document

When meeting with a policymaker or staffer, you may want to bring a short (i.e., one page) document that reinforces your message. The one-pager should be concise, avoid scientific jargon, and have a clear call to action.

Follow up

Send an email after your meetings to thank the person you met with for their time. You can respond to any questions you were unable to answer during the meeting and offer to serve as a resource in the future. This is a great way to continue the conversation and build a relationship with an office. If new information or activity relating to your ask or area of interest arises in the future (e.g., a new bill is introduced), you may want to reach out again.

Communication Tips

Develop a narrative. People tend to remember stories over a recitation of facts. Set the scene for your issue, describe a specific incident and its impact, and end with how the situation has changed. The narrative should tie back into the policymaker's priorities and highlight the importance of your ask for the policymaker. Relevant facts and statistics can be used to follow up on and support your story. Keep in mind that the person you are meeting with will likely not have a background in your field and try to limit the use of discipline-specific words, phrases, or acronyms.

Create a strong positive case for support and focus on pursuing a strong positive outcome. A message is most compelling when it centers around the reasons why something should be done, rather than why something else should not be. For example, federal support for weather, water, and climate science and services will almost certainly create new business opportunities and enable social and economic advancements that could not otherwise occur.

Put the bottom line up front. In general, scientists are trained to communicate background information first, leading up to an explanation of novel work. However, policymakers prefer the opposite approach, with the most important information coming first, followed by supporting details.

Combine humility with confidence. Policy and politics are complex and challenging. Relationships are critical and incentives operate on numerous scales that cut many ways. It is important to keep in mind that elected officials are experts. Their expertise includes understanding their constituents and their supporters as well as communicating with those groups. While political discussions don't always seem to make sense, they can be rational in ways non-experts don't realize until they understand the incentives elected leaders face. Given this complexity, even seasoned veterans of the policy process recognize the need to be humble when engaging decision-makers. Listen carefully to understand the needs and perspectives of the office with which you are speaking and treat the communication as a dialogue. That will give you the best chance of meeting that office's needs and creating a strong and enduring relationship.

Be clear about the limits of your expertise. There is a difference between what you might know as a scientist and what you think a policy should be as a science-informed individual. Accordingly, you should make it clear when you are stating a conclusion rooted in your scientific knowledge and when you are speaking your opinion as a citizen.

Work with others. Messages are often stronger when they are delivered in the context of a group. Consider working with others who may be able to speak on your discussion topic with complementary expertise. When conducting visits as a group, it is important

to ensure that each member is able to contribute their own perspective while also conveying a clear, unified, message and ask.

Practice. We get good at what we practice and practice makes things easier. Practicing your talking points in front of a colleague or friend will help ensure that you are more comfortable delivering them to others and are better able to anticipate potential questions or areas of misunderstanding.

Additional Resources

Researching Elected Officials and Congressional Activity

- [Federalregister.gov](https://www.federalregister.gov)
- [Govtrack.us](https://www.govtrack.us)

Engagement Opportunities

- [AMS Policy Colloquia](#)
- [Geoscience Congressional Visits Days](#)

Communicating With Policymakers

- Higgins, P., [*Developing a Strategy for Engagement*](#)
- National Academies of Sciences, Engineering, and Medicine, [*Communicating Science Effectively: A Research Agenda*](#).
- White, K. and J. Carney, [*Working with Congress: A Scientist's Guide to Policy*](#)

