2.1 What is the purpose of this chapter? This chapter provides guidance for U.S. Fish and Wildlife Service (Service) employees in preparing for meetings and briefings with congressional Members and staff.

2.2 What is the objective of this chapter? The objective of this chapter is to provide guidance and an internal “checklist” of best practices for Service personnel when planning and participating in congressional meetings and briefings.

2.3 What is the scope of this chapter? This chapter applies to:

A. Headquarters (HQ) Congressional and Legislative Affairs (CLA) staff and Regional Congressional Liaisons, and

B. Service employees who participate in congressional meetings or briefings.

2.4 What is a congressional meeting or briefing? Congressional meetings and briefings are meetings with Members of Congress or their staff to discuss Service programs, issues, or activities. These meetings may occur in Washington, D.C., congressional offices located in a State or district, or at other sites. Meetings may be arranged either at the request of a congressional office or at our request. Although congressional meetings may include formal briefings or presentations, it’s not always necessary.

2.5 Who is responsible for ensuring employees comply with the requirements associated with congressional meetings and briefings? See Table 2-1.

<table>
<thead>
<tr>
<th>Table 2-1: Responsibilities for Congressional Meetings and Briefings</th>
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<td><strong>These officials…</strong></td>
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<td>A. The Director</td>
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<td>B. The Assistant Director – External Affairs</td>
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<td>C. The Chief, CLA</td>
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<td>D. Regional Directors</td>
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| E. Assistant Regional Directors for External Affairs and Regional Congressional Liaisons | (1) The activities of Regional and field staff related to their participation in congressional meetings and briefings taking place outside of Washington, D.C., and  

(2) Coordinating with the CLA Chief and his/her staff when preparing Service employees for participation in congressional meetings and briefings in Washington, D.C. |
2.6 When are congressional meetings/briefings appropriate and who makes the contacts?

A. Meetings between Service personnel and congressional Members and staff are necessary for a variety of reasons, including:

(1) Congressional requests for information about Service policy, programs or activities;

(2) Briefings in advance of important Service actions, such as new refuge proposals, proposed refuge expansions, controversial land management decisions, listings, critical habitat designations, grant awards, or other milestones; and

(3) General meetings to facilitate working relationships, provide information updates, or to introduce new Service staff working on issues of interest to Members and staff.

B. Regional or field station staff should contact their Regional Congressional Liaison, and HQ program staff should contact HQ CLA staff, for guidance with any congressional meetings/briefings.

C. If a congressional office contacts a Service employee directly to request a meeting/briefing, the employee must contact the Regional Congressional Liaison or HQ CLA staff to determine the proper course of action to fulfill the request.

D. If an employee wants to initiate a visit to a congressional office, he/she should begin by contacting the Regional Congressional Liaison or HQ CLA staff to discuss the issue, rationale for meeting with Congress, and proposed timeline.

E. All visits to congressional offices in Washington, D.C., must be coordinated with the HQ CLA office and recorded on the Meeting Memo produced by that office. In addition, some meetings require advance approval from the supervising Directorate member (see Director's memorandum, Congressional Activities and Meetings, dated 9/28/2011).

F. Congressional meetings outside Washington, D.C., must be coordinated with the Regional Congressional Liaison or Assistant Regional Director for External Affairs.

2.7 How does the Service work with Congress to schedule meetings/briefings?

A. Before Service employees seek to schedule a congressional meeting, they must notify the Regional Congressional Liaison or HQ CLA, or both, as appropriate and depending on the nature of the meeting.

B. The Regional Congressional Liaison or HQ CLA staff may assist in scheduling the meeting. In general, they do this by working directly with congressional staff to find a time that is convenient for everyone involved.

C. If multiple Regional and HQ program staff are conducting coordinated visits, the Regional Congressional Liaison should schedule visits for Regional staff, and HQ CLA staff should schedule visits for HQ program staff.

D. Employees must allow sufficient time for the meeting to be scheduled if the Service is requesting the meeting, particularly if it is with a Member of Congress. The process generally takes at least 3 to 4 weeks advance notice (although in most cases, Members do not finalize their schedules until 1 week in advance.)
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2.8 How should employees prepare for the meeting/briefing?

A. Ensure the meeting/briefing has an agenda with specific goals or messages.

B. Keep the meeting brief and to the point. Plan on 15 minutes to deliver your message and 15 minutes for questions and side issues. Leave enough time between separate meetings for travel and for delays, since meetings often start or end later than anticipated. Above all, be flexible. Members and their staff operate on fluid schedules and you may need to condense your meeting to fit their timeframe.

C. Determine what, if any, materials to provide during or at the conclusion of the meeting.

(1) Examples include:
   
   (a) State fact sheets and program information,
   
   (b) Lists or a map of Service facilities in the Member’s State/district, and
   
   (c) Brochures or other outreach materials.

(2) Materials should be brief, i.e., provide no more than a few pages of information. Any Service fact sheet, program description, press release, briefing paper, or other document given to congressional offices must be appropriately surnamed or approved for release by the appropriate Service office.

D. Contact your Regional Congressional Liaison or HQ CLA staff to discuss potential issues of importance and to develop a list of Service-related issues in the Member’s State/district or of particular interest to the Member. Although the topic of the meeting may be focused on a specific issue, it is important to be aware of other Service issues that may be important to the Member or his/her staff. Also determine who from the Member’s office will attend, and whether outside groups or local representatives will participate in the meeting.

E. Regional Congressional Liaisons or HQ CLA staff can provide most background information on the Member, as well as insight on what additional issues may come up at the meeting. Examples of information typically collected include:

(1) A list of the Member’s committee assignments,

(2) The Member’s sponsorship of relevant legislation,

(3) Recent correspondence to the Service, and

(4) A list of Service facilities in the Member’s State/district.

F. Work with the Regional Congressional Liaison or HQ CLA staff to determine who from the Service should attend the meeting. Try to limit the number of attendees to no more than three Service representatives. It is important to not overwhelm the congressional office with too many attendees or give an unwanted impression of waste. Also note that meetings with congressional Members, Chiefs of Staff, or Legislative Directors typically require senior-level personnel to represent the Service.
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G. Ensure attendees know their roles at the meeting. Determine in advance who will deliver the specific messages, who will handle questions outside the scope of the meeting agenda, and who will take the lead on follow-up items.

H. Ensure that Service program staff are fully aware of lobbying and Hatch Act restrictions on Federal employees. See the Director's memorandum, Congressional Lobbying, dated July 18, 2012. For example, all official messages conveyed during the meeting must be consistent with the Administration’s position. If you have any questions about potential issues or messages, discuss them beforehand with the Regional Congressional Liaison or HQ CLA staff.

I. Consider holding a planning meeting with participants to address coordination for the meeting, particularly if they involve non-Service participants.

J. If you have invited partners from outside of the Federal Government to participate in the meeting, establish guidelines ahead of time about messaging and the need to remain within anti-lobbying restrictions imposed on Federal employees. Avoid any situations where congressional staff may consider Service presence during partners’ lobbying as tacit support for those efforts. Make partners aware of the guidelines under which Service employees must operate.

K. Everyone attending congressional meetings in Washington, D.C., must submit meeting details (e.g., attendees, time, place, purpose of meeting, etc.) to HQ CLA staff no later than the Friday of the week before the meeting for inclusion in the weekly Meeting Memo. Regions should send this information through their Regional Congressional Liaisons; HQ program staff should send it directly to CLA.

2.9 In addition to becoming familiar with the message, how should employees plan for the actual meeting/briefing?

A. Dress appropriately. For meetings held in a Member’s office on Capitol Hill, dress should be “business attire” (i.e., suit and tie for men and suit, dress, or dressy separates for women) or an official uniform.

B. Arrive at the Member’s office on time. Plan to arrive at the House or Senate office buildings early to allow extra time for traffic and security procedures. Most House and Senate office buildings have cafeterias where you can wait if necessary.

C. Be prepared for delays, cancellations, changes in Member and staff participation, abridged meetings, and meetings held in hallways, cafeterias, or in the reception area of the Member’s offices, and for other contingencies. Be flexible and able to deliver your message efficiently regardless of the situation.

D. Take notes. Record requests for additional information and other action items. Agree on a general timeframe to follow up.

E. If the meeting gets “off message,” the Service presenter, Regional Congressional Liaisons, or HQ CLA staff must steer the discussion back to the agenda.

F. Be sure to extend an open invitation to the Member and staff to visit a field station or participate in field work when they are back in the State/district.

2.10 What should happen after the meeting/briefing?

A. The Service presenter must send a follow-up report to the Regional Congressional Liaison or HQ CLA office if they didn’t have representatives at the meeting. If a Regional Congressional Liaison or CLA staff
member attended the meeting, the Liaison or CLA staff member should send the report to those involved in the meeting.

B. The report should include information about who attended the meeting or briefing, the basic issues that were discussed, and who is the lead on any follow-up actions. The report will likely be distributed widely.

C. For high-level meetings, such as those involving Members of Congress in Washington, D.C., the HQ CLA staff member who attended the meeting should send the report to appropriate Service Directorate members.

D. Either the Service presenter or the Regional Congressional Liaison/HQ CLA staff member should send a short note to the congressional staff thanking them for their time and interest in the Service and our mission.

E. The Service presenter or Regional Congressional Liaison/HQ CLA staff member must ensure any follow-up items are addressed within the agreed upon timeframe, and that any follow-up information sent to congressional offices has been cleared by the appropriate supervisors.

/sgd/ Rowan W. Gould
DEPUTY DIRECTOR

Date: July 25, 2013