Fernanda Psihas
University of Texas at Austin

On Behalf of the Fermilab UEC, US LHC UA, and SLAC UO

Report: 2019 HEP Advocacy Trip
Annual Advocacy Trip

For over 35 years, members of the three major HEP users communities have come together for this visit to Congress.

This effort is possible thanks to the support from:

And participation from the HEP community
Annual Advocacy Trip

For over 35 years, members of the three major HEP users communities have come together for this visit to Congress.

The goal of the trip is to visit:

- Congressional offices (meet with their staff)
- Congressional appropriations and authorization committee staff
- The Administration (Office of Management and Budget and Office of Science and Technology Policy)
- Funding agencies (DOE and NSF)
Our message

Thank them for their support
Motivate our ASK

Let me tell you about the P5!
The HEP community making hard choices, cohesively strategizing, and all driven by the science is a BIG deal. We ask for funds for the science that is priority, not just for anything we could do.

Here is how HEP benefits you/us.
How much money is spent in their district (procurements)?
How does HEP benefit society?
... the U.S.?
... education?
... industry/the work-force?
... national security?

These are the exciting questions.
Are they interested in science? Support the ASK and priorities with a BASIC explanation of the science we are pursuing.

These are the exciting people.

These are the exciting projects.

The HEP Field is doing great!
Tell them about our progress, discoveries, plans, etc. Let them know P5 projects are on time and on budget. Do they know about HEP already? Answer their questions, chat about your passion for the science.

The U.S. is a global HEP leader.
We highlight how their support allows U.S. science to thrive and lead globally. Point out the projects, discoveries, and inventions that make the U.S. a great place to do HEP.
The U.S. particle physics community asks for your support of the P5 Report's strategic plan by the passage of an appropriations bill for FY 2020 that includes at least:

$1045M for High Energy Physics within the Department of Energy’s Office of Science
$9B for the National Science Foundation.

This level of funding will strengthen support for scientific research at universities and national laboratories throughout the nation and advance P5 priority projects, operations of existing large facilities, and the completion of small and medium-sized projects, to explore the nature of neutrinos, the Higgs Boson, dark matter, dark energy, and yet-to-be-discovered forces that govern the origin and evolution of our universe.

THE ASK

All content of the packets is done by community groups throughout the year. UEC, SLUO, USLUA and DPF are all represented in this community effort.
Thanks to the support from the Fermilab communications office, we gathered and assembled materials for the trip.

Mike Wallbank  
Leo Aliaga  
Deepika Jena  
Gavin Davies  
Barbara Yaeggy  
Anne Norrick  
Lauren Yates

Cindy Joe  
Zack Williams  
Karl Warburton  
Rob Fine  
Xuan Chen  
Samantha Sword-Fehlberg  
Kirsty Duffy
This trip allows us to **address questions from Congress** by incorporating their feedback and answer questions with new materials and information.

**New this year.**

Brochure addressing questions about the P5 progress
New this year. Automated, district-specific grant and procurement information.

District-specific materials provide direct links between the appropriated funds and local economic benefits.

From Michael Baumer’s: https://mbaumer.github.io/us_hep_funding/
Goals for March 2019

100% coverage of offices visits/packets delivered.

Strengthen the following points in our message:

- P5 progress.
- Different areas of research/sources of funding
- Progress of specific projects
- Importance of research groups in the scientific process
2019 Trip organizers

Harvey Newman  Fernanda Psihas  Michael Baumer
2019 Trip Attendees

Xuan Chen
Harvey Newman
Mariel Pettee
Savannah Thais
Breese Quinn
Thomas Warburton
Salvatore Rappoccio
Justin Vasel
Rob Fine
Saptaparna Bhattacharya
Andrea Albert
Leonidas Aliaga Soplin
Adi Ashkenazi
Brian Nord

Gavin Davies
Fernanda Psihas
Aaron Dominguez
Joseph Zennamo
Louise Suter
Cindy Joe
Joseph Haley
Sergei Gleyzer
Mathew Muether
Kirsty Duffy
Anne Norrick
Sarah Demers
Julia Gonski
Georgia Karagiorgi

Andrew Furmanski
Barbara Yaeggy
Mike Wallbank
Deepika Jena
Michael Baumer
Corrinne Mills
Eva Halkiadakis
Duncan Wood
Eli Rykoff
Maris Arthurs
Kirk Barrow
Justin May
Randy White
Emma Castiglia

Corrinne Mills
Titas Roy
Blake Forland
Constantin Weisser
Matthew Feickert
Rachel Bartek
Bryan Ramson
Erika Catano Mur
Lauren Yates
Meenakshi Narain
Samantha Sword-Fehlberg
Mandy Rominsky
Adam Anderson
Jane Nachtman

Mike Baumer
Jacob Pasner
Zachary Williams
Brendan Kiburg
Andre De Gouvea
Adam Moren
Micah Groh
Will Flanagan
Alexx Perloff
Amber Johnson
Herman White
Dylan Frizzell
Gordan Krnjaic
Scarlet Norberg
March 2019 Attendees

68 trip attendees, (40 UEC, 20 USLUA, 8 SLUO)
- 28 women (41%)
- 4 under-represented minorities*
  (10% of attending U.S. Citizens / 6% of All attendees)
- 33 early-career (grad students & postdocs, 48%)

*URMs are American citizens who are Blacks, Hispanics, and American Indians or Alaska Natives (APS Reference)

Our Challenge

3 days 68 attendees 538 congressional offices
1,191 connections to congressional offices
In 2018-2019 we incorporated a new web-based organizational platform.

**Goals:**
Automate trip logistics to increase our effectiveness.

Maintain a database of connections to districts and potential trip attendees.

Most efficiently utilize resources on the trip.

Create performance metrics to provide feedback from the trip.

**WHIPS TEAM**

Justin Vasel  
Main Developer

Fernanda Psihas
WHIPS
Washington-HEP Integrated Planning System

Keeps attendee’s schedules and connections.
Allows for live scheduling on the ground.
Provides a guide through scheduling progress and office information.

Your Full Schedule

<table>
<thead>
<tr>
<th>Type</th>
<th>Meeting</th>
<th>Time</th>
<th>Location</th>
<th>Primary</th>
<th>Secondary</th>
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<tbody>
<tr>
<td>Leg</td>
<td>Donnelly, Joe</td>
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<td>Justin Vasel</td>
</tr>
</tbody>
</table>

MEETING #766
Rep. Bill Foster D-IL 11
Congressional Office Meeting - House

Welcome to WHIPS!
There are 6 days remaining until the trip. Contact your assignments!
31 meetings are still unassigned. Claim them here.
**2019 Trip Statistics**

Live information of scheduled meetings and offices visited on the ground.

WHIPS maintains records of meetings and meeting reports over all years.

Meeting reports and statistics regarding contact, schedule, and meeting itself.

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**HEPAP - DC Trip Report**

**Fernanda Psihas**
March 2019: Connection Coverage

- We track the connections that people have to congressional districts to maximize the number of meetings we can schedule.

- This year, we had 97% connection coverage in the Senate and 71% in the House.

- Our goal was to achieve 100% office visits. Connections help us get meetings scheduled, though not necessary in all offices.
This year, our attendees had connections to fewer congressional offices than in 2018.
March 2019

Materials Delivered in 2019
538 packets delivered

We delivered our message to 100% of the 538 congressional offices.

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2019</th>
<th>% change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trip attendees</td>
<td>54</td>
<td>68</td>
<td>20%</td>
</tr>
<tr>
<td>Senate offices</td>
<td>84</td>
<td>100</td>
<td>↑ 16%</td>
</tr>
<tr>
<td>House offices</td>
<td>305</td>
<td>438</td>
<td>↑ 30%</td>
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NEW RECORD!
March 2019

We increased the number of in-person meetings: 87% (79%) of all Senate (House) offices. Combined total = 80.1%

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<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>% change</th>
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<tr>
<td>Trip attendees</td>
<td>54</td>
<td>54</td>
<td>68</td>
<td>20%</td>
</tr>
<tr>
<td>Senate offices</td>
<td>72</td>
<td>84</td>
<td>87</td>
<td>↑ 4%</td>
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<tr>
<td>House offices</td>
<td>276</td>
<td>305</td>
<td>346</td>
<td>↑ 13%</td>
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Offices Visited
Senate = 87%
House = 79.2%

NEW RECORD!

Georgia Karagiorgi

HEPAP - DC Trip Report

Fernanda Psihas
## Who we meet with...

<table>
<thead>
<tr>
<th>Staff Title</th>
<th>Meetings</th>
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<td>Legislative Assistant</td>
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<tr>
<td>Legislative Director</td>
<td>38</td>
</tr>
<tr>
<td>Legislative Correspondent</td>
<td>37</td>
</tr>
<tr>
<td>Other</td>
<td>34</td>
</tr>
<tr>
<td>Legislative Aide</td>
<td>12</td>
</tr>
<tr>
<td>Senior Policy Advisor</td>
<td>10</td>
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<tr>
<td>Policy Advisor</td>
<td>8</td>
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<tr>
<td>Legislative Counsel</td>
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<tr>
<td>Fellow</td>
<td>5</td>
</tr>
<tr>
<td>Chief of Staff</td>
<td>4</td>
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<tr>
<td>Deputy Chief of Staff</td>
<td>4</td>
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<tr>
<td>Congressional Aide</td>
<td>3</td>
</tr>
<tr>
<td>Scheduler</td>
<td>3</td>
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<tr>
<td>Communications Director</td>
<td>1</td>
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<td>Press Secretary</td>
<td>1</td>
</tr>
<tr>
<td>&lt;Unspecified&gt;</td>
<td>49</td>
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</table>

Out of the 538 offices, 156 have non-zero relevance scores due to their participation in appropriations and authorization committees and leadership.

<table>
<thead>
<tr>
<th></th>
<th>2018</th>
<th>2019</th>
<th>% change</th>
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<tbody>
<tr>
<td>High-value meetings</td>
<td>84%</td>
<td>87%</td>
<td>↑ 3%</td>
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</table>
Executive and Agency meetings.

These high-value meetings allow us to summarize and communicate feedback to our funding agencies, as well as present them with our message.

Executive and agency meetings are scheduled by Professor Harvey Newman each year.

Office

- DOE Office of Science HQ
- Office of Management and Budget (OMB)
- National Science Foundation
- DOE Germantown
Out of the 538 offices, 156 have non-zero relevance scores.

We scheduled 436 meetings.

Each meeting is attended by a contact person (Lead) and a secondary person.

Newer trip attendees focus on support roles (secondary) in most meetings.
These high-impact meetings provide us with valuable feedback for our message and give us an insight into the appropriations process for the coming fiscal year.

These meetings happen every year, organized and led by Professor Breese Quinn.
Professor Quinn’s Notes from the past several years:

The most frequent and strongest communicated messages from subcommittee staff and members with our comments and recommendations

1. A budget agreement precedes appropriations decisions. We are encouraged to advocate for budget agreements.

2. Committees would like to understand the biggest threats to our funding/program (e.g. sequestration, President’s requested cuts, etc.)

3. Many in these committees would like to better understand the breakdown of our funding programs (between U.S. and international funding as well as the role and funding level of university groups and overall)

4. Given the current priorities of the House of Representatives, HEP “should be prepared for the budget increases of the past years to decline”. (from the head of the Democratic staffers)
Professor Quinn’s Notes from the past several years:

The most frequent and strongest communicated messages from subcommittee staff and members with our comments and recommendations

5. Repeatedly, we have been asked how we evaluate P5. Specifically, how we review the ongoing P5 program and how the science we learn continues to improve and inform the ongoing priorities (from the Democratic majority, E&W appropriations and SST authorization subcommittees)

Breese’s Conclusions:
We have worked hard to successfully earn the reputation of being the "gold standard" of program planning, not just in science, but more broadly. We have profited from that reputation immensely. Members commenting on point 5 above feel that this request has not been answered for a couple of years now. If we don't respond to this request in a credible manner by next March latest, we will go a long way to laying down that mantle along with the goodwill and funding benefits that have come with it.

Fernanda Psihas
Maintaining relationships with the congressional offices is a year-round task, and is crucial to keeping the HEP message relevant throughout the appropriations process.

In addition to following up with congressional offices on current developments, the community addresses appropriations subcommittee chairs directly with our requests.

April 5, 2019
Chairwoman Marcy Kaptur
Subcommittee on Energy and Water Development
Committee on Appropriations
2186 Rayburn House Office Building
Washington, D.C. 20515

Ranking Member Mike Simpson
Subcommittee on Energy and Water Development
Committee on Appropriations
2084 Rayburn House Office Building
Washington, D.C. 20515

Dear Chairwoman Kaptur and Ranking Member Simpson:

We are writing on behalf of the U.S. community of approximately 6,000 scientists, engineers and students from 180 universities, laboratories and institutes that conduct research in high energy physics. We greatly appreciate your support for the High Energy Physics (HEP) program in the [...] Robust funding, at the $1.045 billion level, is necessary to build on recent progress and the sustained, unified, groundbreaking efforts of our nation’s high energy physics community. We are grateful for your continued leadership in funding this important field of discovery science that contributes to the pre-eminence of our nation and our quality of life.

Dr. Gavin Davies
Chair, Fermilab Users Executive Committee
Department of Physics
Swain Hall West
Indiana University
727 E. Third St.
Bloomington, IN 47405-7105

Dr. Nicola Omodei
Chair SLAC Users Organization Executive Committee
Hansen Experimental Physics Laboratory and Kavli Institute for Particle Astrophysics and Cosmology
Stanford University
Stanford, CA 94035
Dear Colleague...

During our visit, we ask all offices to consider signing on to dear-colleague letters sponsored by HEP supporters in Congress. The number of signatories is also a source of feedback regarding the support of Congress to HEP through the Office of Science at DOE as well as NSF.

**DOE Office of Science**

**FY20 House Letter**

160 signatories
102 signatories for FY19

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**FY20 Senate Letter**

30 signatories

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**NSF**

**FY20 House Letter**

173 signatories
168 signatories for FY19

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**FY20 Senate Letter**

37 signatories
29 signatories for FY19
Questions to address and improvements for 2020

The HEP prioritization strategy continues to be well received in Congress.

Increasingly, congressional committees, OMB, and OSTP ask about how we are reviewing the ongoing execution of P5 as well as what the process and timing of the next P5 is. The start of the next Snowmass planning & the DPF town hall meeting was a well-received concept in executive meetings. Much feedback can still be provided on these questions.

This year’s additions to our materials addressed specific questions brought up by appropriations subcommittees successfully.

Continued support to develop our materials is key. Our broad informational packet allows trip attendees to cover a broad range of topics of interest to different offices: the science, projects, National labs, P5 progress, impact to industry, economic impact, impact on education.

We have significantly improved our logistics and training for this effort.

In coming years, emphasis will continue on selecting and training trip attendees to best represent the community and most effectively deliver our message.
Comments from trip attendees

“I heard back from the staffer immediately ‘This is one of my favorite meetings all year! Looking forward to your visit.’”

“Attending the trip exposed me to a new side of the field, and I felt like I was making a direct contribution to the long term success of particle physics in the U.S.”

“This trip made me feel closer to my own government and the HEP community.”

“It is a true privilege to be able to represent our field in this effort, I was surprised to see how much my representatives care about the experiences of young scientist.”

Thank you for the support that makes this effort possible.