

Primer

How to Write a Scoring Request Letter to CBO

A practical guide for congressional staff on requesting budget and economic scores from the Congressional Budget Office

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April 2026

Introduction

A scoring request letter is the formal channel through which Members of Congress can engage the Congressional Budget Office (CBO) to analyze their legislation. The letter holds three primary functions: It opens an official record of the Member's request to CBO, it defines the analytical framework and parameters for CBO's scoring, and it establishes the expected timeline and key points of contact for CBO staff.

If it is well written, a scoring request letter can give a congressional office a timely and complete score that truly addresses the questions the Member wants answered. For instance, the Member may only want to know the legislation's effects on federal spending, revenues, and deficits. If so, the letter would be a request for "conventional" analysis or scoring of the bill. That said, the Member may want to know how the legislation affects the budget through its impact on jobs, economic growth, inflation, and so forth. In that case, the letter would be asking for an economic or "dynamic" analysis as well as a conventional scoring.

If the letter is incomplete or written poorly, particularly if it fails to identify the type of scoring requested, it may delay the scoring process and result in a score that does not address the Member's questions and may inaccurately estimate the fiscal effects of a piece of legislation.

The purpose of this primer is to serve as a useful guide to producing an effective scoring request letter. It explains the reasoning behind each element of the scoring request, provides a model letter to follow, and includes a checklist to avoid common pitfalls.

Key Elements of a Scoring Request Letter

Every CBO scoring request letter should contain the following elements:

- A date at the top of the letter.
- An address directed to the director of CBO.
- A reference line identifying the legislation by bill number and title.
- A salutation to the director by name.
- An opening paragraph stating the scoring request and the deadline.
- A paragraph requesting a meeting to start the project and specifying the conventional scoring questions to be discussed.
- A list of the key economic concepts to be addressed in any dynamic score.
- A closing paragraph identifying points of contact and next steps.
- A Member signature.

The sections that follow explain each of these elements and their specific purpose.

Dating and Addressing the Letter

Always date the letter. Dating the letter establishes when the clock starts on the request and creates the official record of timing. A dateless letter invites ambiguity and weakens any later conversation about whether CBO has been responsive.

Always address scoring requests to the director of the Congressional Budget Office. Currently, that is:

CBO Director

Dr. Phillip Swagel

Director

Congressional Budget Office

Fourth Floor

Ford House Office Building

Washington, DC 20515-6925

Although the analytical work will be performed by CBO staff, address the letter to the director. The director is ultimately responsible for CBO's final response, and the request is a formal engagement between the Member and CBO. In addition, the director is the only employee of CBO hired jointly by the House and Senate. Thus, he is especially accountable to elected Members for the timeliness and quality of CBO's work.

Identifying the Topic in the Reference Line

Use the reference line to identify the legislation clearly and completely. A good reference line includes the bill number and the full title of the bill. For example, take the following hypothetical bill:

Re: Research and scoring request for H.R. 1776, the Grand Annual National Independence Day Universal Ice Cream Distribution, Commemoration, and Patriotic Dessert Access Act

This may seem like too much information for the reference line, but it clearly identifies the request in CBO's intake queue and ensures the file is directed to the correct analytical division at CBO.

The Opening Paragraph

Three key pieces of information need to be in the opening paragraph:

- **The type of score being requested**

State explicitly whether the request is for a conventional budget score, a dynamic score, or both. Also include the time horizon. The typical time horizon is almost always 10 years.

- **The scoring deadline**

State clearly when the score needs to be in the Member's hands. When selecting the date, be sure to keep the legislative calendar in mind (markup date, floor vote, recess window).

- **A reference to the attached bill text**

Always attach a copy of the legislation to the letter. The attached text provides the authoritative version CBO will analyze. This is especially important if the legislation has gone through several revisions or, in some cases, committee markup.

It is also helpful to include some contextual information such as the committee responsible for considering the legislation, readiness for committee consideration, and the number of co-sponsors on the bill. Remember to include names of staff who can answer questions from CBO staff. Include their emails, if possible. These details can help CBO prioritize and expedite the request against its other work.

Specifying the Conventional Budget Score

A conventional budget score accounts for microeconomic behavioral responses from households and firms (“first-order effects”) and how those effects change outlays and revenues. However, there is substantial analytical judgment involved in deciding which behavioral factors to model. The letter should name the specific factors the Member considers most important.

For example, for a piece of legislation that provides a business expense allowance, the letter requesting conventional scoring might include:

Specifically, we should discuss how consumer behavior might affect federal outlays, and how the expense allowance for businesses provided in the legislation might affect firm profitability for the [relevant] industry and, thus, federal revenues from corporate and “pass-through” tax collections.

The key principle is to identify, from the very start, the scoring elements the Member wants CBO to include. If those elements are not stated in the letter, CBO is free to score the bill according to its default conventions, which may or may not capture the effects the Member believes are most important.

Specifying the Dynamic Score

While a conventional score accounts for microeconomic changes, it does not incorporate any macroeconomic feedback from changes to policy. For example, a change to the corporate income

tax will have no permanent effect on economic growth. By contrast, a dynamic or economic score captures macroeconomic effects of legislation. When the request includes a dynamic score, be sure to list the economic concepts that should be addressed. This is the single most important analytical section of the letter. It is the Member's opportunity to define the scope of the macroeconomic analysis and to ensure the score includes the economic variables that will define the fiscal effect of the bill.

A dynamic scoring request would typically include:

- The size of the relevant population likely to be affected by the legislation, and the adoption or take-up rate of that population over time.
- The likely path of prices and inflation for the relevant products, services, or inputs.
- International trade implications, where relevant. This includes effects on imports, exports, and domestic production.
- Labor market effects, including changes in labor force participation, hours worked, and wage paths where the legislation touches employment incentives.
- Capital formation and investment effects for legislation affecting the cost of capital, expensing, or depreciation.
- Any other scoring elements the Member determines are important to a defensible analysis of how the legislation will affect federal spending and revenues over the next 10 years.

The goal of this section is not to dictate CBO's methodology but to ensure that the final score addresses the questions the Member believes are most relevant to the legislation.

Requesting a Meeting to Start the Scoring

Always request a meeting with CBO to launch the scoring project. The meeting is the first and best opportunity to align on key points before CBO's analytical work begins.

The kickoff meeting should include:

- A walk-through of the legislation by the Member's staff.
- Identification of the scoring elements the Member expects to see in CBO's work.
- Agreement on a timeline, including interim check-in dates to discuss progress on the score.
- Identification of points of contact on both sides.

It is helpful to propose a target date range for the meeting in the letter itself. A reasonable range is generally within 60–90 days of submitting the request. This gives CBO a concrete window to work within.

Points of Contact and Closing

Close the letter by identifying the staff person who will handle scheduling and by providing a direct phone number. A named point of contact with a direct phone number shows that the Member’s office expects a timely response, and it also prevents any misdirected responses from CBO.

Finally, thank the director for CBO’s attention to the request, and sign the letter personally. It is worth noting that scoring requests carry more weight when signed by the Member rather than a chief of staff.

Model Letter

The following model letter illustrates each of the elements described above. It is in regard to a fictional bill (H.R. 1776), but the language can be adapted to any legislation that requires scoring.

Model Scoring Request Letter

April 16, 2026

Dr. Phillip Swagel

Director

Congressional Budget Office

Fourth Floor

Ford House Office Building

Washington, DC 20515-6925

Re: Research and scoring request for H.R. 1776, the Grand Annual National Independence Day Universal Ice Cream Distribution, Commemoration, and Patriotic Dessert Access Act

Dear Director Swagel:

I am writing to request the assistance of your staff in preparing a 10-year conventional budget score and a 10-year dynamic or economic budget score of my bill, H.R. 1776. A copy of the bill is attached to this letter, and the proposed legislation is ready for consideration by the House Committee on Agriculture. The bill currently has 305 co-sponsors. The work of the Congressional Budget Office would be timely if the scores requested above could be in my hands by May 1, 2026.

We should begin the analytical work on this legislation with a meeting between my staff and yours, during which my staff can describe the legislation and identify the scoring elements we expect to see in CBO's work. Specifically, we should discuss how consumer behavior might affect federal outlays, and how the expense allowance for businesses provided in the legislation might affect firm profitability for the ice cream industry and, thus, federal revenues from corporate and "pass-through" tax collections. Also,

- we should identify the size of the relevant population that likely would buy the product and the adoption rate of this population over time;
- the likely path of price change (or inflation) of the relevant products and inputs to those products;
- any international trade implications stemming from adoption of the legislation;
- and any other scoring elements we determine important to a defensible analysis of how H.R. 1776 will affect federal spending and revenues over the next 10 fiscal years.

These and other matters important to scoring this legislation will be identified at our initial meeting, which I am hopeful will occur near the middle of February. My staff and I stand ready to answer any questions you may have prior to that meeting and to work with you in scheduling time with your staff. My scheduler, Roger Reminder, will contact your office early next week. He can be reached immediately at 202-xxx-yyyy.

Again, many thanks for your attention to this request.

Yours truly,
[Signature]

Member of Congress

When CBO Delivers the Score

The scoring request letter is the beginning of the process with CBO. When CBO returns the scoring, the Member's office has an opportunity to review the analysis, ask clarifying questions, and, when necessary, push back and contest aspects of the scoring.

If you have built a strong relationship with the scoring team

It is sometimes possible to request a draft score from the analytical team even before the director's final letter is transmitted. This is more likely to happen when the Member's staff has been engaged and responsive throughout the analytical process.

If the final letter has arrived and you have concerns

All concerns should be communicated in writing and orally, as soon as possible. A well-founded objection, if delivered quickly, can prompt a revision. This is particularly likely if the concern relates to a scoring element the original request letter specified but the score did not adequately address.

If CBO is unwilling to revise

Consider a follow-up letter that lays out the analytical disagreement formally. This is where the Fiscal Lab may be able assist in drafting a critique of the methodology or assumptions CBO used. Taking this step is appropriate when the disagreement is genuinely analytical and the Member wants the critique on record.

Pre-Submission Checklist

Before the original request letter goes out, be sure to confirm each of the following elements is in your letter.

	Element	Check
<input type="checkbox"/>	Date	The letter is dated.
<input type="checkbox"/>	Addressee	Addressed to the director of CBO at the correct address.
<input type="checkbox"/>	Reference line	Bill number and full title of the legislation are included.
<input type="checkbox"/>	Bill attached	A copy of the legislation is attached.
<input type="checkbox"/>	Score type	Conventional, dynamic, or both is specified explicitly.
<input type="checkbox"/>	Time horizon	Ten-year horizon is stated. Or an alternative timeline if necessary.
<input type="checkbox"/>	Deadline	A specific delivery date is given and makes sense within the congressional calendar.
<input type="checkbox"/>	Conventional elements	The key behavioral and response measures for the conventional score are named.
<input type="checkbox"/>	Dynamic elements	The economic concepts for the dynamic score are listed.
<input type="checkbox"/>	Kickoff meeting	A meeting is requested with a proposed time window as well as interim check-in dates to discuss progress.
<input type="checkbox"/>	Point of contact	A named staff scheduler and direct phone number are provided.
<input type="checkbox"/>	Signature	The letter is signed by the Member.

Common Pitfalls to Avoid

- Leaving the scoring to CBO's default conventions

If the letter does not specify the economic elements the Member wants reflected in the scoring, CBO will score the bill with its standard conventions, which may inaccurately evaluate the legislation.

- **Requesting only a conventional score when dynamic effects matter**
For legislation whose economic rationale depends on behavioral or macroeconomic channels, a conventional-only request forecloses the analysis that would show the bill's true fiscal footprint. Although it should be noted that not all legislation requires dynamic scoring.
- **An unspecified deadline**
A letter without a deadline inevitably leads to delays. It helps to tie the deadline to a real legislative milestone.
- **No kickoff meeting**
The initial meeting is perhaps the most crucial step in the process. This meeting is where most of the misunderstandings about the legislation and the defining elements of its scoring can be clarified and resolved.
- **A general intake contact instead of a named scheduler**
When CBO needs to reach the office quickly, a named contact with a direct line of communication can make a significant difference in the outcome.

Contact the Fiscal Lab for Further Assistance

The Fiscal Lab supports congressional offices at every stage of the scoring process: assisting with drafting the request letter, preparing for meetings with CBO, providing analytical support with our own modeling, and if necessary, assisting with formal critiques of CBO scoring decisions. Contact the Fiscal Lab scoring team for support and guidance at any stage of the process.