

## *Tips for Effective Meetings with Elected Officials*

### *Prepare for Your Meeting*

- **Decide who will attend the meeting.** You can meet alone or bring a coalition of people who represent other interested groups. Bringing more than four or five people can be hard to manage. If you bring constituents or people who represent constituents, that is the best. Consider bringing people who represent different groups that have an interest in the issue(s) you are discussing. (i.e. If Great Lakes are the issues, bring in individuals that can speak to it from following viewpoints: environmental and public health, tourism, economics, jobs, etc.)
- **Do your research.** Learn how to say your elected official's name. Learn about your elected officials' district, voting record, and any statements on the issues. Become familiar with the views and arguments on both sides of the issue.
- **Make a clear ask.** Offices expect you to make an ask. Do you want the legislator to draft legislation, propose an amendment, vote for a specific bill, comment on an issue? Asking your legislator or his or her staff member to do something specific will help you know how successful your visit has been!
- **Have talking points.** Develop talking points to make your position clear, provide background for the ask, and keep the meeting focused. You do not need to stick to the talking points word for word, but it provides you with a guiding document to prevent rambling and going off course during the meeting.
- **Plan out your meeting.** People can get nervous in a meeting, and time is limited. Be sure that you lay out the meeting beforehand, including identifying a leader for the meeting to keep the meeting on track. Identify who will start the conversation and who will talk about what issue or what order in which people will talk. Please note, while you plan out the meeting you still need to be flexible should the elected official bring up a different topic or ask a question.
- **Bring materials.** Prepare materials to leave with the elected official or staff.

### *During the Meeting*

- **Be prompt and patient.** Elected officials run on very tight schedules. Be sure to show up on time for your appointment, and be patient – it is not uncommon for legislators to be late or to have your meeting interrupted by other business.
- **Dress professionally.** A business suit or professional work attire is appropriate.
- **Keep it short and focused!** You will have twenty minutes or less with a staff person, and as little as ten minutes if you meet with your elected official. Make the most of that brief time by sticking to your topic. The more simply and clearly you can share your position, story, and data, the better chance you have that elected officials and their staff members will take note and take action.
- **Attempt to make a personal connection with the legislator or staffer.** Indicate if you have any business, family or social affiliations in common. This is actually fairly common particularly at the state level and will often work in your favor to make your meeting, and yourself more memorable.
- **Begin with introductions and thank yous.** Start the meeting by introducing yourselves and thanking the legislator for any votes he or she has made in support of your issues, and for taking the time to meet with you. If you have chosen a spokesperson, the spokesperson can lead the introductions and conversation.
- **Make a clear ask.** Offices expect you to make an ask. Do you want the legislator to draft legislation, propose an amendment, vote for a specific bill, comment on an issue? Asking your legislator or his or her staff member to do something specific will help you know how successful your visit has been!
- **Personalize your comments and provide local context.** Your passion is your advocacy super-power. Sharing your story about your work, and the impact of current events on you and your work, puts the

issues in memorable, human terms. Personal stories from constituents can have great influence on legislators and their staff members.

- **Engage the person you are meeting with.** You do not want to just talk at the elected official or staff member. Ask them questions about their positions, their issues, or how you can be of assistance. Make it a two-way conversation. You will learn more about the elected official's perspective and position this way.
- **Be honest.** Do not exaggerate or say anything false to make a point or answer a question.
- **Do not argue with legislators or make threats.** If it is clear that they will not support your position, just share the facts and ask them to consider your viewpoint. Even if you disagree, you always want to remain courteous and keep the lines of communication open for discussing future issues with legislators and their staff members.
- **Say "I don't know" or "I will follow up."** You need not be an expert on the topic you are discussing. If you don't know the answer to a question, it is fine to tell your legislator that you will get that information for him or her. This gives you the chance to put your strongest arguments into their files, and allows you to contact them again about the issue. Never make up an answer to a question - giving wrong or inaccurate information can seriously damage your credibility!
- **Set deadlines for a response.** Often, if an elected official hasn't taken a position on legislation, they will not commit to one in the middle of a meeting. If he or she has to think about it, or if you are meeting with a staff member, ask when you should check back in to find out what your legislator intends to do about your request. If you need to get information to your legislator, set a clear timeline for when this will happen. That way, you aren't left hanging indefinitely.
- **Take pictures and use social media.** Take pictures outside of the office or during the meeting with the elected official if allowed. You can share the pictures on social media tagging the elected official reinforcing the ask.
- **Take notes.** Have a notepad and pen handy in case the legislator asks for more information or asks specific questions for follow up.
- **Provide a "leave behind" packet.** At the end of the meeting, provide the elected official or staffer with facts and information regarding your position(s)/issues(s) in a folder. Be sure to bring a business card or contact information. Do not provide this information during the meeting or they will be distracted reading it and will not be engaged in the conversation.

### *After the Meeting*

- **Send a thank you.** After you meet with an elected official or their staff, write a thank you note thanking them for taking the time to meet with you, reminding them of the issues you discussed, sharing an invitation to an upcoming event or activity, and providing any follow-up material you promised during the meeting to reaffirm that you are a resource for them in the community.
- **Stay in touch.**

