

Tips for a Successful Meeting

The purpose and objectives of a district meeting

Meeting with a member of Congress (or other elected official) or congressional staff is a very effective way to convey a message about a specific legislative issue and to demonstrate your expertise to your elected officials. In district visits allow you to establish a relationship with your member of congress in your community, where often the member will have more time and focus than in Washington. Below are some suggestions to consider when planning a visit to a congressional office in the district. The tools outlined below are targeted towards meeting with your member of Congress or United States Senator. These tips can be easily applied to meetings with state legislators, county commissioners, city council members and more. Always keep in mind that elected officials are always looking to make connections with constituents, so take the first step and begin building relationships with your elected officials today.

Once you've scheduled your meeting (see [In-District Advocacy: Scheduling a Meeting](#)): Do your homework!

- Be Organized and Prepared.
 - ✓ Gather information and materials supporting your position which may be helpful during the meeting. Prepare a leave behind with background information and a repeat of your “ask.”
 - ✓ Lawmakers are required to take positions on many different issues. In some instances, a lawmaker may lack important details about the pros and cons of a particular matter. It is therefore helpful to share with them information and examples that demonstrate clearly the impact or benefits associated with a particular issue or piece of legislation.
 - ✓ Rehearse what you plan to say. If you will be in a group, make sure everyone knows who will make what points.
 - ✓ If you are meeting in a group, decide on a leader(s) before the meeting. Pick someone who has experience, if possible, and who is comfortable with introductions and small talk. You may very well be meeting with cynical staffers who “know it all” or have “heard it all,” so someone who can make a good first impression is vital.

- Be Knowledgeable. Before the meeting, consider the questions below.
 - Know your legislator(s):*
 - ✓ What are their interests?
 - ✓ What are their backgrounds?
 - ✓ What is their record of support of issues that you care about?
 - ✓ What committees do they sit on?
 - ✓ What Caucuses are they part of?
 - ✓ Who is the chair of the committee that will consider your proposal?
 - ✓ What related legislation are they working on? Look for something recent which could or does positively affects you and/or your work and thank them for it. They will be happy to hear your appreciation of their hard work whether or not the legislation did or will pass.

 - Know your issue:*
 - ✓ What is the substance of the legislation you are proposing (or opposing)?
 - ✓ Why is it important?
 - ✓ What will happen if it passes?

- ✓ What will happen if it does not pass?
- ✓ How much will it cost?
- ✓ How can your expertise help the legislator better understand the issue? (Be specific, use examples, and visuals)

Know the process, but don't sweat the details.

- ✓ What steps does a proposed ordinance/law/bill go through from introduction to enactment?
- ✓ Which committees will consider the legislation in question?
- ✓ Where is the bill in the process?
- ✓ Don't be afraid to ask questions about the process-your job is to know why this legislation is important to you, their job is to know the process.

During the Meeting: Tips for a good experience.

- Be Prompt and Patient.
 - ✓ It is not uncommon for a legislator to be late, or to have a meeting interrupted, due to a crowded schedule. If interruptions do occur, be flexible. When the opportunity presents itself, continue your meeting with a member's staff. Meeting with staff can be an effective way to develop a relationship with your lawmakers. Staff will take your materials and relay the conversation to the legislators.
- Be Concise.
 - ✓ Know your message and stick to it. Have a concrete "ASK" e.g. I'd like you to co-sponsor HR XXXX, please vote yes on HR XXXX)
- Be Appreciative.
 - ✓ Make sure to thank your legislator and/or the legislator's staff for taking time to speak with you.
- Be a resource
 - ✓ Use your expertise to your advantage, offer to show the member some of your or your firms high profile projects.
- Be Sincere.
 - ✓ Ask directly how you can help them do their work.
 - ✓ Ask how you can follow up (e.g., "You said you could use some help on some graphic materials for your green legislation, may I put it together for you?"; "When can we get together on those materials you said you needed?"; "Who on your staff should I work with on those materials you requested?")
 - You are making it apparent that your offer was meaningful. You are becoming a part of the lawmaker's team and, potentially, a sounding board or adviser.
- Be Responsive.
 - ✓ Be prepared to answer questions or provide additional information.
 - You don't know exactly what the member will ask you, so also be prepared to say, "I don't know, but I will find out and follow up with you and your staff."

After the Meeting: Thank you and Follow Up

- Follow up the meeting with a handwritten thank you letter.
 - ✓ Outline the different points covered during the meeting, and send any additional information and materials requested.
 - ✓ Be prompt with follow up and thank you.