

# TIPS FOR MEETING WITH LEGISLATORS

A face-to-face meeting of individuals or a small group of individuals with an elected representative, or a key member of their staff, is the best way to teach them about your concerns and, ideally, influence their decisions. Don't feel you are imposing: after all, legislators meet with constituents daily. If you feel intimidated at first, remember that legislators depend on you for support just as you depend on them. What follows are a few steps to help ensure a successful meeting.

## *Step 1: Arranging the Visit*

- Don't just drop in. Visits can be scheduled, preferably 2 to 3 weeks in advance, through the appointment/calendar secretary either at the local district office or the capitol office. Unless you have an unusual problem, don't ask to meet for more than half an hour. You will probably get 10 to 15 minutes.
- Explain the reason for the visit: Get Acquainted? Express Views? Seek Action? Identify who will be attending. You'll increase your chances of meeting face-to-face with the member by having a group meeting of constituents who represent different experiences and backgrounds. This broadens your base and influence.
- Depending on legislative developments, it may be necessary to meet with staff rather than the legislator. Since legislators rely heavily on their professional staff's opinion, this is also a very important meeting. Staff members are vital gatekeepers; they must be cultivated. They can provide you with access and, if they are sympathetic with your position, can become a trusted voice in the ear of the legislator. If your legislator decides to adopt one of your causes, it is the staff who will do much of the work.
- Confirm the visit by letter soon after arranging the appointment, and then again by phone the previous day.

## *Step 2: Preparing for the Visit*

- If you're going as a group, agree on your goal and message before hand. Show a united front. Divisiveness is both irritating and confusing. Agree on one spokesperson in advance.
- DO YOUR HOMEWORK. Have well-reasoned facts and figures on your issue(s) ready, but do not be overwhelming. Be ready to answer questions and (when necessary) respond to counter-arguments made by your opponents. Don't be afraid to say you don't know, but will get back to the legislator with needed information.
- Be sure that all participants in the meeting know the extent of the legislator's district, his/her committee assignments, number of terms served, voting record, and/or position, on the issue(s). Know the lawmaking process and what legislative actions are required. Be pleasant even if you disagree. Alienating your legislator won't help.
- Prepare a "leave-behind" information packet for the legislator. Include information on where to contact you, fact sheets and stories about your issues, constituent letters, and any briefing materials deemed appropriate. If

needed, a request for specific action and the reasons for it should also be included.

- If possible, have high profile supporters send strong letters expressing their point of view before your meeting takes place. "Dear Colleague" letters, written by elected officials and directed to their fellow legislators, are also effective and should be sent prior to your meeting or at least be included in your information packet.

### ***Step 3: During the Visit (Arrive on time, even a little early).***

- When visiting your legislator, assemble a delegation which represents a broad base of her/his constituency. It's always good to have an "odd-couple" -- a person representing a group that is not usually affiliated with another organization represented e.g. parents from LDA and the Arc.
- Be on time, positive, friendly. Know your agenda and stick to your message. Don't assume the legislator is familiar with the details of the issue/bill. Take notes during the visit which will provide a written summary. Be alert to staff members assigned to work in this area.
- Make your presentation simple and straightforward. You may have only 5 or 10 minutes left by the time you get through with introductions and pleasantries. When visiting your legislator, prepare two sets of remarks: One that is 15 minutes, the other that is 90 seconds long. That way you will be prepared if she/he is called out of the office in the middle of your visit.
- Because it was you who arranged the visit, legislators will expect that you start the discussion. One format for discussion follows a simple outline:
- Create an Open Climate.
  - Begin the visit by introducing yourselves and thanking the legislator for meeting with you as well as for some favorable position they have already taken (if there is one).
  - Present your Message.
  - OPEN the discussion by framing the issue on your terms;
  - EXPLORE the issue by taking a position and identifying any relevant legislation;
  - SUPPORT your position by explaining why such a measure is good public policy;
  - APPLY the policy to real lives by making clear how the legislation affects people in the legislator's district. Anecdotal evidence of how you will be personally affected can also be very moving. A few, memorable statistics can further emphasize your point. When possible show that the issue affects the legislator's committee assignments. Also, be sure to cite any significant support within the district.
- Make a Specific Request for Legislative Action.
  - A specific request for legislative action will allow you to control the meeting. You have now set the agenda. If attempts are made to divert discussion, simply, and politely, return to your issue. Finally, if the legislator seems supportive, seek a commitment. If the legislator remains opposed, ask her or him to keep an open mind and remain neutral.
- Be responsive to your legislators questions. If you don't know the answer to a question, don't fake it or bluff. Say "I don't know, but I'll get back to you on it." Then DO IT.

- Don't overstay your welcome. Conclude the visit by again extending the appropriate thank you. Reaffirm your intention to forward any information or materials which was **requested by the legislator**.

#### ***Step 4: Following the Visit (Always debrief as a group immediately afterwards).***

Personal visits always increase a legislator's awareness of an issue. However, the effectiveness of such a visit increases markedly when accompanied by follow-up actions.

Send a thank-you note or letter which reinforces your message and the local impact, restates an understanding of the legislator's position, highlights the main points of the visit, and concludes with a personal story which surfaced during the conversation. It should also provide the member with any additional materials or information s/he may have requested.

Send a copy to other members of the group and those who are directly lobbying on your behalf. If the visit was held with a staff member, still address the letter to the legislator with a copy (cc) to the staff member.

Adapted from the Department of Education  
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