



Key Tips for Meeting With Policymakers

You've researched your issue and made an appointment with your local, state, or federal policymaker. Now it's time to get your game on in terms of delivering your message clearly and succinctly. The more you can do to prepare up front, the better off your meeting is likely to go and the higher chance your message will be heard and considered.

Before Your Meeting

✓ Do your homework.

Research basic information about the policymaker, including the ways in which they have engaged with your issue in the past. Is he a big supporter? Is she a naysayer or opponent? If so, what is the primary argument against your issue and what information can you share to help persuade her?

✓ Define participants and roles.

Determine who will attend the meeting, what their role will be, and what they should be prepared to speak about. Everyone in your group should play a role. Ideally there will be 2–3 individuals from your organization attending. Here are some ideas when considering individual roles:

- **Host**—introduces all participants in your group and thanks the policymaker or staffer for their time.
- **Primary Spokesperson**—this is the person who will deliver the overall background and purpose for your visit, and who guides the conversation for your group.
- **Priority Messenger**—delivers the key messages you want to convey with regard to specific policies or needs.
- **Storyteller**—provides the “real world” context about the issue by sharing stories of constituents directly affected by the policy.
- **Data Provider**—supplies the facts and figures that support the emotional side of your issue.

✓ Prepare.

Develop talking points for all involved, and *practice your presentations together*. You'll want to come across as professional, polished, and confident.

✓ Create or identify a leave-behind.

Leaving something with policymakers and staff that provides an overview of your main points will reinforce your in-person presentation. Summarize your primary points in a one-page document that you will leave with the attendees. Make sure that your leave-behind contains your contact information and bring more copies than you think you need.

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During Your Meeting

Use the following steps to ensure you cover all the points you want to address when meeting with policymakers.

✓ Provide introductions.

Ensure that you introduce everyone in your party, and that you record the names of all policymaker staff in attendance.

✓ Be succinct and direct.

Give a quick summary of your organization and why you requested the meeting. Begin with the basics. Provide enough information to give your organization credibility, but don't use all your time talking about your organization.

✓ Review your priorities, the need, and your request.

Be prepared to clearly explain how the policymaker's support of your request will meet the needs of their constituents. If the policymaker has supported your issue in the past, be sure to acknowledge that support and explain how the current request is an opportunity to build on that support and move forward.

✓ Engage the policymaker related to their priorities.

Ask the policymaker how your priorities and request fit into the priorities for his or her office. Ask if he or she has questions. Be ready to politely neutralize opposing views and identify potential areas of common ground. Do NOT engage in an argument.

✓ Tell a story.

Share a story that connects your priorities, the policymaker's priorities or personal history to your request.

✓ Offer to be a resource.

Let the policymaker know that you are ready and willing to provide information, data, stories, testimony, or anything else he or she needs to learn more about your issue.

✓ Say thank you!

Take the opportunity to thank policymakers not only for their time, but also for their willingness to listen.

✓ Remember: Staff Matter!

It's not uncommon for policymakers to send staff to take their place in meetings at the last minute. Staff members can be your greatest allies and connections to a policymaker. They often are charged with gathering information to inform policy decisions, so they pay close attention and may even be more likely to consider your points more carefully than their bosses. Some staff members move from one office to another over time, they may have insights into policymaker priorities and relationships that can work to your advantage.



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What to do if the meeting gets off track

What if the policymaker doesn't have time to meet with me, or only has a few minutes?

✓ Be prepared to deliver a three-minute statement

about who your organization is, what you do, why it matters, and what you hope the policymaker will consider doing to support your priorities. Always make sure the policymaker or their staff receives a copy of your leave-behind and contact information. Follow up with a request to reschedule.

What if the policymaker doesn't seem to be interested in what I'm saying?

✓ Ask the policymaker what his or her current priorities are

and identify ways in which your issue and priorities might dovetail with those. Ask what your organization might be able to do to support the policymaker's priorities. If interest still seems to be lagging, shorten your presentation and move on.

What if the policymaker disagrees with my organization's mission/priorities/request?

✓ If you've done your homework,

you'll likely know where you will encounter points of disagreement before they arise. Practice neutralizing arguments before your meeting and directing the conversation toward points of common ground. If you *must* disagree, do so very respectfully and acknowledge that the policymaker has valid points. Do not engage in argument, and *never, ever* attack!

How do I keep the meeting on track if the policymaker is very talkative?

Managing a talkative policymaker is tricky, but there are a few tricks you can use to your advantage.

✓ Use the phrase, "yes, and" to steer the conversation back to where you want it to go.

"Yes, sidewalks in our district are in need of repair, and that's a great example of how transportation is tied to the needs of community members. Getting to work and to school safely is the first step to success for many students and parents in your district."

✓ Ask direct questions.

When the policymaker pauses, ask a direct question about how what he or she is saying ties into your issue. "That's a great point, Senator, and it makes me wonder—is there an opportunity in the jobs bill to support maternal and child health? Maybe through workplace health plans?"

✓ Listen carefully.

Sometimes people talk to feel important. If you can determine what's most important to the policymaker, you can help alleviate the cause of their chattiness. For example, if a policymaker is outlining all he or she has already done, spend time thanking and reinforcing them, explain that you see them as a key champion, and how your current need represents a next step you can take together.

What do I do if I don't know the answer to a question?

✓ Say that you don't have the information on hand, but that you'll get back with an answer

within a specified timeframe. Once the meeting has ended be sure to respond within the timeframe you promised.



After Your Meeting

Follow up and keep the momentum going.

- ✓ Supply any information you promised during the meeting.
- ✓ Send personal thank-you notes to everyone who was in attendance.
- ✓ Earn extra points by sending a personal thank-you to the staff member who arranged the meeting for you.
- ✓ Create a plan for ongoing engagement including regularly checking in with staff, inviting the policymaker to events, and regularly meeting with them to check in on top priorities and future legislation.

Meeting with policymakers can be intimidating, but it's a great opportunity to make a strong, positive impression that can greatly further your cause. At the end of the day, engaging policymakers is all about forging relationships, and there's no better way than face-to-face!

For more tips on engaging with policymakers, see "Five Rules for Policymaker Engagement" in the ACS Online Toolkit http://www.advocacyandcommunication.org/wp-content/themes/acs/docs/resources/policy_maker_engagement_December_2015/ACS_Five_Rules_Poliymaker_Engagement-1-1.pdf. View all Tools & Resources here: <http://www.advocacyandcommunication.org/tools-resources/>



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