



Five Steps to Effective Policymaker Engagement

If there's an issue you'd like to see addressed in your community, policy is part of the solution. That means getting in front of policymakers will be part of your task. Policymakers have thousands of constituents vying for their attention—how do you make sure your issue isn't lost in the noise?

One visit with a policymaker won't be enough to get their attention. Educating and engaging policymakers requires ongoing, intentional effort and strategy. **Here are five key steps** you can take to ensure your effort is successful. We've also included some bonus tips for troubleshooting common challenges during meetings with policymakers.

Step 1: Identify Policymakers for Relationship Building

Think strategically about your organization's priorities and determine which policymakers are most important to engage as potential allies. Also identify policymakers who may be opponents with whom it would be beneficial to build bridges.

Step 2: Introduce Yourself

- ▶ **Begin outreach to policymakers' offices.** Add them to your mailing lists, send issue-specific letters, thank them when they take actions that are favorable to your cause, and introduce yourself to their staff.
- ▶ **Become a familiar face.** Find others who have relationships with the policymaker and ask for an introduction, attend events where the policymaker is present, invite policymakers to your events, publish letters to the editor praising policymakers when they've involved themselves in policy that supports your issue, and stay connected with the policymaker on social media.
- ▶ **Staff matter!** Get to know policymaker staff—they can be your greatest allies. They often are charged with gathering information to inform policy decisions, so they pay close attention to information provided to them. It's not unusual for policymakers to send staff to a meeting in their place, and that's ok. Staff may be more likely to consider your points thoughtfully than their bosses in these meetings. Some staff members move from one office to another over time and may have insights into policymaker priorities and relationships that can work to your advantage.

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Step 3: Grow the Relationship

Once you've started to build a relationship, request a meeting.

- ▶ If there are policy decisions pending that will have an impact on your priorities, explain that to the policymaker's staff and ask for a meeting in their legislative offices during the legislative session.
- ▶ If your goal is to provide more background and set the stage for a longer-term view, you'll find policymaker schedules may be more flexible when you are able to meet with them in their local offices during legislative breaks.

Once you've scheduled a meeting, assemble your team and make a plan.

- ▶ **Do your homework.** Research basic information about the policymakers. Do they have a personal history with your issue? What's their voting record related to your priorities? If they are an opponent, what is the primary argument against your issue, and what information can you share to help persuade them to consider your side?
- ▶ **Define participants and roles.** Determine who will attend the meeting, what their role will be, and what they should be prepared to speak about. Ideally there will be two or three individuals from your organization attending, and everyone should play a role:
 - Someone to make introductions.
 - Someone to articulate the purpose for your visit.
 - Someone to deliver policy-specific messages.
 - Someone to tell a personal story related to the issue at hand, if it makes sense to include this and if there is time.
- ▶ **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 leave with attendees. Make sure that your leave-behind contains your contact information and bring more copies than you think you need.

Step 4: Deliver Your Message with Confidence

Although the person you're meeting with may hold considerable power, you are the expert in the room. Remember the following eight things to be sure you deliver your message with confidence. Check out the end of this guide for tips on what to do if the meeting gets off track.

1. **Make introductions.** Introduce everyone in your party, and record the names of all policymakers and staff in attendance.
2. **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.

3. **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, acknowledge that support and explain how the current request is an opportunity to build on that support and move forward.
4. **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 there are questions. Be ready to politely neutralize opposing views and identify potential areas of common ground. Do NOT engage in an argument.
5. **Tell a story.** Share a story that connects your priorities to the policymaker's priorities or your personal history related to the topic area
6. **Offer to be a resource.** Let the policymaker know that you are ready and willing to provide information, data, stories, testimony, or anything else needed to learn more about your issue.
7. **Say thank you!** Thank policymakers not only for their time, but also for their willingness to listen.
8. **Follow up immediately.** Provide follow-up information or materials quickly. Send a personal thank you note to everyone from the policymaker's staff that attended the meeting and thank the staffer who arranged the meeting for you.

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!

Step 5: Engage Regularly.

- ▶ Aim to make contact at least three times in the weeks or months following your meeting to keep you and your issue on the policymaker's radar.
- ▶ Think about your long-term strategy and how you can continue the relationship building you began in Step 1. Create a plan for ongoing engagement including:
 - Check in regularly with the staff.
 - Invite the policymaker to attend your events.
 - Meet regularly with them to discuss top priorities and future legislation.
- ▶ Provide information, updates, and feedback to the policymaker's office regularly, send emails and follow up with phone calls, choose email subject lines that stand out, and craft letters to include key information in a compelling way within the first paragraph.

Engaging with policymakers often involves a significant commitment of time on your part, but the benefits are well worth the effort.

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. 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 can 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 on track.** For example, "Yes, sidewalks in our district need 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 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 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.

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