

# TIPS FOR A SUCCESSFUL MEETING WITH YOUR ELECTED OFFICIALS

Face to face meetings with your elected officials and their key staff aides are an extremely useful way to get to know them and communicate your views on important issues. Legislators, busy as they are, usually find time to meet with their constituents. Here are a few tips for having an effective personal meeting with elected officials.

## 1. SCHEDULE YOUR MEETING IN ADVANCE

There are many demands made of legislators both in the state capital and at home. Their schedules fill up quickly. Give them enough lead-time to be able to schedule a meeting and try to be flexible about the time. It is recommended calling to schedule an appointment.

When you call, make sure you identify yourself as a constituent, and state the purpose of the meeting. For example, “We want to discuss the Senator’s/House member’s/Assemblyman’s/Representative’s/Governor’s position on funding for \_\_\_\_\_.”

The following script is intended to help you make a phone call to schedule a visit.

Hi! I’m \_\_\_\_\_, from \_\_\_\_\_. I will be in (your state capital city) on (date), and would like an appointment to meet with Governor \_\_\_\_\_, Senator \_\_\_\_\_, Assemblyman or Representative \_\_\_\_\_ to discuss state education policy that impacts the achievement of students in our public schools. I would be more than happy to meet with the legislative assistant who works on education issues if the (elected official) is unavailable. Is someone available the afternoon of the (date of your visit)? If no one is available, I would like to drop by the office anyway to leave some information for the (elected official) to review.

**TIP:** Don’t just “drop by” the office and expect to have a meeting.

While legislative offices will always try to accommodate constituents, it can be a major hassle for them if you drop by unannounced to meet with the elected official. You may end up pulling them out of an important committee hearing, interrupting a staff meeting or some other critical activity. They’ll remember you, but not in the way you want.

## 2. BE PREPARED - BE INFORMATIVE - BE THOROUGH - BE CONCISE

You’ll rarely have more than 15 or 20 minutes to state your case. So it’s very important for you to be well prepared, and to be able to express your views succinctly and clearly. Here are some ideas to help you get to the point quickly and be understood.

- Make yourself some written notes listing the key point you want to make.
- Personalize the issue by explaining very briefly how it affects you, your family, and others in the community. However, avoid excessive background—get to the point quickly.

- As for action – tell what you want them to do and explain (again briefly) how your proposal will make things better.
- Be aware of who might oppose your proposal and why. Be prepared to defend your position with facts.
- If the issue is complicated, say so, and leave behind additional material to provide something in writing that explains the problem and solutions more completely.
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### 3. **BRING WRITTEN MATERIAL WITH YOU, IF AT ALL POSSIBLE**

Given the short amount of time you will have for your meeting, it's always helpful to have brief fact sheets, position papers, or other material you can leave behind. You should plan to bring a brochure or information about your organization(s) to include in the packet.

### 4. **BE ON TIME– BE FLEXIBLE**

Don't be late to an appointment. Your legislators are very busy and may be forced to skip your meeting altogether if you're running even a few minutes late. If you do get stuck in another meeting and you know you're going to be a little late, call ahead and let them know when you expect to arrive. They'll try their best to accommodate you, if you give them a little warning.

On the other hand, you may be kept waiting or your meeting may be interrupted. Sometimes you may have to conduct your business while you walk with your elected official to a committee meeting.

### 5. **DON'T BE DISAPPOINTED IF YOU MEET WITH STAFF INSTEAD OF THE ELECTED OFFICIAL.**

Last minute changes in schedule may force a legislator to ask that you meet with their staff aides. Don't be upset if this happens! Key staff aides are often more familiar with education or other policy issues than their busy bosses. Many are the best possible persons to listen to your point of view and they will advise the member of the legislature of your concerns at precisely the right moment. Meeting with key staff is just as important as meeting personally with elected officials—sometimes more so.

### 6. **DON'T ARGUE**

If there's a disagreement over policy issues, present your case in a straightforward, forceful but friendly manner. Don't get bogged down and waste your valuable and limited time in an argument if the legislator or staffer doesn't agree with you. You can always follow up on points of disagreement with a letter explaining your views in further detail.

### 7. **PERSONALIZE THE ISSUE**

State policies are intended to have broad impact. It may be hard for elected officials to have a clear picture of how their votes on a complicated law actually end up affecting their individual constituents. Explain, in your own words, how the policy personally

affects the lives of students, families and educators in the schools of their state or legislative district. Tell one or two very short real stories to illustrate this. You will help your legislator better understand the consequences of the policy on real people who vote for them.

8. **BE INCLUSIVE**

Remember that state education laws affect different constituents in many different ways – students, parents, teachers, other educators, employers, etc. At the same time, try to frame the matter as a “student-driver” issue. Even when you talk about something as specific as teacher policy, keep the focus on positive results for students.

9. **VOLUNTEER TO BE A RESOURCE CONTACT**

Legislators and their staff aides will always welcome a constituent who is knowledgeable on specific issues and is willing to be a local resource contact who can give them advice on short notice. Make sure you let them know your area of expertise and leave contact information with them.

10. **ALWAYS FOLLOW UP WITH A “THANK YOU”**

When you get home, don’t forget to send the person you met with a “thank you” note for meeting with you. This is also an opportunity to briefly restate your position or concern and requested action – and to enclose additional information. If you met with a staff person (not a legislator), send a separate letter to the legislator they work for letting them know that their staff aid has ably represented their views.