

Tips for Effective Meetings with Policymakers



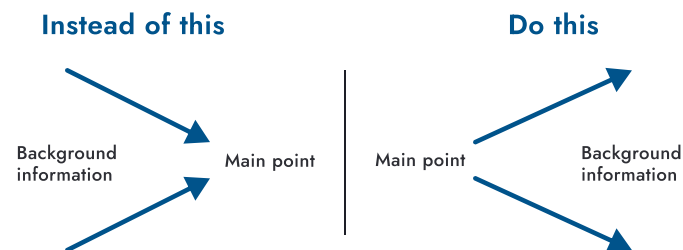
Preparation and purpose are both key to a successful meeting with a policymaker's office. A well-crafted and practiced message helps your argument be heard and understood.

Construct your message

Know your audience. Tailor your message to the people in the meeting. Who are you meeting with: the policymaker themselves or a staffer? What is their background? Do they have expertise or experience on the topics you want to discuss? What do you have in common with them?

Dig into the official's website to explore their bio, recent press releases, and positions on key issues. In the past, how have they voted or what statements have they made on related policies? If you are meeting with a staffer, LinkedIn and LegiStorm can be good resources to learn more about their background. Staffers have their boss's ear and are influential in shaping their policy objectives.

Lead with the main reason for your meeting. Unlike a scientific talk or classroom lecture, you should not begin with background information and build up to a main point. Instead, you should state your purpose for the meeting and/or request up front and then provide supporting information. This allows you to maximize limited meeting time and dive into a meaningful discussion.



Lead with your main point and support it with background information instead of building up to it.

Make it relevant and relatable. Make your argument relevant. Why should this office care about the issue you are discussing? How does it relate to the people or issues that are important to them? How does this impact their state or district? Avoid jargon, acronyms, and

complex technical topics, unless you know the person has adequate expertise.

Tell your story. There is a reason you are having this meeting, and not someone else. How and why are you personally invested in what you are asking? How does this affect you, people you know, or others in a similar situation? These personal aspects help make your argument more memorable and compelling.

Requesting a Meeting

Getting a meeting with a policymaker's office is likely easier than you think! Elected officials represent you, so listening to you isn't a favor. It's their job.

Whether you're seeking a meeting with your mayor or your senator's office, first check your own availability. You should identify several blocks of time across several days in the next few weeks when you would be available to meet. Then, find a contact phone number for the office you wish to meet with.

Call the office and say who you are and that you want to meet in-person or virtually to discuss your issue. Offices are eager to hear from constituents so be clear about your connection to their district, state, or city. The policymaker may not be available, but if they are, often you'll need to work with their scheduler or assistant to get on their calendar.

Alternatively, ask to meet with an appropriate staffer. Congressional staffers often have different policy portfolios, so think about what broad topic your issue fits into (science, education, defense, immigration, etc.), and don't hang up without getting an email address or phone number to follow up with.

In follow up correspondence or calls, always reiterate:

- That you are a constituent
- What you want to discuss
- All the times that you are available to meet

Bear in mind that many staffers receive hundreds of emails a day, so be persistent, patient, and polite.

Sample Structure for Meetings

1. Introductions

- State who you are, your affiliation, and (if true) that you are a constituent.
- Thank the official for meeting and show appreciation for something they've done previously, if possible.
- If you're meeting with a congressional office, be aware that you will likely meet with a staffer and not the Member.

2. Present your main point, purpose, or request.

- State your request/purpose at the beginning: "I am here to ask you/your office to take THIS action."

3. Make supporting arguments.

- Offer a relevant personal story about you, your colleagues, or your students, but don't recite your CV.
- Be succinct. Try to introduce yourself, the issue, and your key supporting points all within the first 10 minutes. Reserve the rest of the meeting for questions and discussion. Congressional meetings rarely run more than 30 minutes, and may be much shorter when schedules are packed.
- Gauge their reaction and adjust your approach accordingly. ("Is this something that you're interested in supporting?")
- Ask if they have any questions. If you get a question you are not comfortable answering, say you don't know off the top of your head but will get back to them. (Be sure to follow up as promised.)

4. Offer assistance.

If appropriate, offer to be a resource for the staffer on this issue.

5. Wrap-up.

Repeat your main point, gauge their support, and thank them again.

6. Follow up.

After the meeting, within a week, send a thank you email or note. This can be a good opportunity to include any additional information or materials you wanted to share with the office.

General advice for meetings

- Always use a respectful tone, even when meeting with an office whose positions you may not share.
- Be aware of your audience's political leanings and try to avoid unnecessary political landmines.
- Strongly consider creating a one-pager or flier with your talking points that can guide conversation and be given to a staffer to share with policymakers.

- Practice what you want to say in the meeting, including introductions and personal stories ahead of time.
- If you are meeting as a team (rather than one-on-one), plan out speaking orders, transitions, and who will cover which points before the meeting.
- Don't be disappointed if a meeting seems rushed or chaotic.
- Some staffers may be new, so be prepared to meet with novices.

Virtual meetings

- Test the software you are meeting on (Zoom, Teams, etc.) the day before the meeting.
- Edit your Zoom name in advance to include your first and last name and any organization/institution you are representing.
- Avoid a distracting or noisy surrounding. Consider a virtual background, but only use logos from institutions you are authorized to speak for.
- Dress in business casual attire. (No ties but also no T-shirts).
- Test your camera and microphone 30 minutes before the meeting.
- Join the virtual meeting no more than five minutes before the scheduled start time.
- In video meetings, some staffers may have their camera off. If possible, keep your camera on regardless, to put a face to the issue you are discussing.

In-Person meetings

- Dress in business attire (ties, jackets, dresses, pantsuits, etc.).
- Don't arrive too early (more than five minutes) to the office, since there may not be room for you to wait.
- If you're going to be more than 10 minutes late, contact the office.
- When you arrive at the office, greet the staffer nearest the door and tell them who you are. Also inform them of who you have a meeting with and what time the meeting is scheduled for.
- Meeting spaces can be small, so you may need to hold your coat or other items.
- Factor in time to go through any security before your meeting. Some offices might require you to be escorted from the front door by a staffer.