

Advocacy Toolkit

15 Steps for Meeting With Your Elected Official or Representative

A face-to-face meeting with your elected official or representative can be a powerful opportunity to advance your agenda. The meeting can also position you as a reliable expert on your issue and an important ally for your legislator — if it's done right. Follow these steps for a successful visit:

1. **Plan your meeting.** Decide whether you are going alone, or with a group of constituents. If you go as a group, decide who is going to lead the meeting, and what each person is going to contribute to the discussion. This will help eliminate awkward silences or repetitive messages, and will ensure that you hit all the key points you want to cover. You will likely have only 15 or 20 minutes for your meeting, so plan accordingly.
2. **Know your audience.** Do a little research about the person you are going to meet if you don't know much about him or her. Find out his or her positions on the issues you're focusing on.
3. **Prioritize.** If there are multiple issues that are important to you, select one that you will discuss for that meeting. Attempting to persuade a legislator on multiple issues not only weakens your position as a reliable, focused constituent, but it dilutes your impact on each issue.
4. **Define your message.** Focus your comments on one issue. Then, rather than trying to say everything you know or think about that issue, plan two or three observations or arguments that get at the heart of your position.
5. **Be flexible.** Make an appointment...but don't be surprised if it changes. Legislators often have last-minute hearings or committee meetings.
6. **Connect.** Once you're in the door, begin by finding something personal that you have in common with the legislator. Do they live on the street where your mother grew up? Are their kids in your child's class at school? Does something in their office suggest an interest that you share, such as fishing, sports, or art? Engage in a little "small talk" to break the ice — but keep it brief.
7. **State the reason for your visit.** Be clear about why you are there, why they should be interested, and what you want them to do. Remember to mention again that you're a constituent, and use local examples.
8. **State your case.** Again, keep it concise, focused, and personalized.
9. **Invite comments and questions.** Engage your elected official or representative in dialogue. Don't worry if they ask you something you don't know the answer to; simply tell them you don't know, but that you'll find out for them.
10. **State only what you know.** Don't overstate your case, fudge the facts, or guess.
11. **Ask for a commitment.** If you don't ask your elected official or representative for action, you won't see any. If they decline, encourage them to think about it, and let them know you'll keep in touch.
12. **Have a leave-behind.** Provide your legislator with brief, written information for further reflection. Make sure it contains the local angle for your district.
13. **Report on your visit.** As soon as possible after your visit (in the hallway is ideal), jot down notes that record the tone, what was said, and what questions were asked in the meeting. Not only will this help in reporting on your visit, but also it will help you build a record of your relationship with your elected official or representative that can inform future dialogue. Let your group know that you made the visit, and report what you covered and what the legislator said. If possible, provide them with a copy of your leave-behind materials as well.
14. **Follow up.** Send a handwritten thank-you note to your elected official or representative. Let them know that you appreciate their time. If you promised to get the m additional information, provide it or let them know how and when they can expect to receive it.
15. **Visit more than once.** Over time, visit with your elected official or representative to continue to discuss the issue and make requests as you have them. Be sure to be a reliable source of information for them on your issue by delivering what you promise, avoiding overstatement, and communicating