



# Tips for Conducting Effective Meetings with Elected Officials



## SETTING UP MEETINGS

- ✓ **DO** strategically target your face-to-face meetings by first determining how this meeting would fit into your overall strategy to win. Why do you want to meet with this elected official? Does he or she have the power to give you what you want? Do they have jurisdiction over your issue because they chair/sit on an important committee? Are you or one of the meeting attendees a constituent?
- ✓ When you've decided to ask for a face-to-face meeting, **DO** find out from the elected official's scheduler the preferred method of requesting a meeting. This preferred method will likely be email, which will also need to include the date and times you are available, the purpose of meeting and the names of those attending.
- ✓ **DO** schedule your meeting well in advance of your preferred meeting date. This can be anywhere from 2-4 weeks ahead of the meeting or more, with longer lead times more likely to find space on a busy official's schedule.

- ✓ **DO** limit the number of attendees, but **DO** try to bring a constituent of the elected official with you. If a constituent will be attending the meeting, **DO** let the elected official's office know. If you have promised a constituent for the meeting, make sure that constituent attends, as you **DON'T** want to upset the office.
- ✓ When scheduling multiple meetings for the same day, **DO** give yourself time between meetings. You will want to remain flexible to the complexities of an elected official's schedule and allow yourself plenty of time to get from one meeting to the next.

## BEFORE MEETINGS

- ✓ **DO** provide the elected official's office with information about your organization and your issue.
- ✓ **DO** prepare for the meeting by doing your homework.
  - ✓ Learn the elected official's position on your issue(s) and any related politics.

- ✓ Learn the roles the elected official plays on the issue (e.g. Is he/she on a key committee with jurisdiction on the issue?)
  - ✓ Learn the elected official's voting pattern on the issue.
  - ✓ Learn about any pressures the elected official may be under regarding this issue.
  - ✓ Know the concerns of the opposition on the issue and be able to respond to them.
  - ✓ Keep abreast of how the media is treating the issue and the elected official's position on it.
  - ✓ Obtain supporting documents for your position.
  - ✓ Identify the staff person who works on the issue you want to discuss.
- ✓ **DO** prepare for the meeting by preparing and practicing your message.
  - ✓ **DO** prepare talking points and **DO** know those key points like the back of your hand.
  - ✓ **DO** have your elevator speech with your ask ready to go. Sometimes elected officials will join meetings late and/or leave early, so having your elevator speech – your quick explanation of who you are, why you're there and your ask – may come in handy.
  - ✓ **DO** consider role playing the meeting in advance. This will help prepare you and also help you define in advance the role of each person attending the meeting.
- ✓ **DO** determine your "ask." Be clear about the action you want the elected official to take.
  - ✓ **DO** consider a fallback position from your primary ask. If support for your primary position from the elected official seems unlikely, be ready with a second ask, perhaps for an additional meeting or for the elected official to come meet your members on your turf.

## DURING MEETINGS

- ✓ **DO** be early for the meeting, but **DON'T** be too early. Elected officials' offices can be busy places with packed meeting schedules and limited space. Aim to be 5 minutes early for a meeting. This will give the office enough time to let the elected official and office staff know you're there, while not getting in the way of other office activities.
- ✓ Make sure to **DO** individual attendee introductions. Also, **DON'T** forget to introduce your organization, who you serve and how many. Everyone in the meeting should take time to say who they are and their role with your organization, even if their role in the meeting is as a constituent.
- ✓ **DO** thank the elected official and/or the staff member for their time at the beginning and at the end of the meeting.
- ✓ **DO** refer to the elected official by their title, (i.e. Representative, Congressman, Senator, etc.)
- ✓ When the meeting begins, **DO** try to start off your conversation with something lighter or a shared connection or experience with the elected official. If no such connection or experience exists, try looking around the office for something to talk about or compliment. Everyone's style differs, but there is something to be said for establishing a connection before you begin with the work at hand.
- ✓ **DO** maintain your clarity on why you're there: To express the views of your organization and all you represent on an important issue, to hear from the elected on where they stand on the issue, and to get the elected official to agree to your ask.
- ✓ **DO** maintain control of the meeting. If the elected official strays from the topic, be prepared to politely direct the conversation to the issue you're there to talk about.

- ✓ **DO** mention your power by highlighting how many members you have and/or how many teachers, both active and retired, live in your state. These numbers will serve to show your clout in the community and the votes you can bring to bear.
- ✓ **DO** be polite and ask nicely. At the same time, **DON'T** be intimidated and realize that you have power too, the power that comes with speaking for your members.
- ✓ **DO** always give accurate information. If you don't know an answer, it is okay to say "I don't know" and promise to follow up with the correct information.
- ✓ **DO** try to get an answer for your ask. Elected officials may want to wait to make a decision on your issue because they are uncertain of the policy and/or politics surrounding it. If you can't pin them down on your issue during the meeting, try to pin them down on your fallback position.
- ✓ **DO** have materials as leave behinds for the elected official or for staff.

## AFTER YOUR MEETING

- ✓ **DO** follow up. If you promised to provide additional information to the elected official during your meeting, be sure to provide that information.
- ✓ **DO** keep the pressure on. If the elected official remains uncommitted after your meeting, consider additional advocacy tactics like letter writing or phone calls to the official to keep the pressure on.