

Scheduling, Preparing, and Executing a Meeting with Elected Officials

In-person meetings with elected officials or their staff members are a wonderful way to engage with federal, state, and local government. Effectively preparing for, executing, and following up on a meeting is essential to ensure that your message is heard.

Scheduling a Meeting with Your Elected Official

If you are scheduling a meeting with a Member of Congress in Washington, DC, make a call to their *DC based office* at least three weeks prior to your anticipated visit.

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If you are scheduling a meeting with a Member of Congress in their state or district, a state Senator or Representative, or local elected official (i.e. City Council, Board of Education, etc.), make a call to the *state or district office* of the elected official you are trying to meet with, at three weeks prior to your desired meeting date.

Scheduling Tips

- When you call the office, ask to speak with the person in charge of scheduling.
- Coordinate a mutually-convenient date and time with the person in charge of scheduling. This meeting may be with the official themselves, or it might be with one of their staff members.
- Remember to thank the person who scheduled the meeting.
- It is always a good idea to call back closer to the date of the appointment to confirm the availability of the official or their staff member as schedules can be fluid and change regularly.

Preparing for a Meeting with Your Elected Official

1. Research the official (their general background, education, relevant voting record, things you have in common, etc.)
2. Share your research with those attending the meeting with you so that they have the same knowledge about the elected official.
3. Compose a “I-minute pitch” that briefly explains what you do and why it is important and relevant.
4. Figure out your specific “ask”. This should be a concise request that you can pose to the member at the end of the meeting. (Example: Will you cosponsor this bill? Or, will you support our requested funding in the upcoming appropriations bill?)
5. Make a “leave-behind folder” with a few easy-to-understand materials explaining the “ask.” This is especially important if your meeting is with a staff member who will then share your information with the official.

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Executing a Meeting with Your Elected Official

1. Start the meeting with a thank you for their time, for their general support in the past, for a specific sponsorship or vote in the past, or a combination.
2. Introduce each person in attendance. If there are connections between the people in your group and the official or their staff, it would be beneficial to make that connection early on.
3. Even if the official/staff member is already familiar with you, give a brief summary of what you do, who you serve, and how it is relevant to their constituents.
4. Make your “ask” (remember to be concise). Explain why this ask is important to you or those you represent, as well as the constituents of the official you are meeting with.
5. Answer any questions they may have to the best of your ability. If you are unable to answer a question, let them know you will follow up with the information requested after the meeting.
6. Wrap up the conversation with a few key summarizing points.
7. Thank the official/staff member and shake their hand.
8. Leave behind a folder of info on your organization and your “ask.”
9. Leave your contact information so that the official or staff member can contact you if needed with any further questions, concerns, or requests.
10. Be sure to send a note after the meeting thanking the official or staff member for their time and attention. Provide any information they may have requested and remind them again of your “ask”.

Tips for meeting with elected officials

Do not be nervous. Elected officials and staff members appreciate hearing from constituents and gathering information on important issues. You are the expert on your issue.

Treat staff with respect. Staff members are the eyes and ears for the official. The opportunity to speak with staff is equally as valuable as speaking with your elected official.

Keep the meeting brief. Elected officials and staff can spend hours in numerous meetings every day, so be as brief and clear as possible.

Do not yell or get defensive. Despite your passion about an issue, you are unlikely to get a positive response if you yell or attack the elected official or staff member.

Do not make up an answer to a question. If you do not know something, ask for the staffer’s contact information and let them know you will follow up when you find the answer.