



Steps to Effective Meetings with Members of Congress, State Legislators, and Staffers

Before the Meeting: Plan well to ensure a productive meeting with an elected official or a staff member.

- Review the legislative calendar to know when Congress or the State Legislature is in session. That's when the Legislators are more likely to be at the Capitol, rather than somewhere in the district. If you're meeting during a recess period, you are more likely to meet with a staffer; they will have more time for a meeting.
- Schedule your meeting with the Legislator at least a month in advance; their schedule fills up quickly. If he or she is not available, see the staffer who directly handles your issue (usually the health-care staffer).
- Legislators and staffers have to know about a wide range of issues and you may be bringing one they are not familiar with. Sometimes they don't focus on an issue until a vote is coming up on it. It's an advantage if you're the first one to discuss a particular issue with them. Staffers often look young and, therefore, inexperienced, but they usually know a great deal and their bosses rely on them for information and recommendations.
- Send a brief outline of the discussion topic to the person that you will be meeting with. They will appreciate this because it will help them better prepare for the meeting. This is another way of reminding them about your meeting.
- Research the elected official's biographical information. You may find you have something in common. Also look up their committee assignments. Committee work takes up the bulk of their time; it's easier for them to help you if your issue is one related to their committees. This is also where they usually have the most expertise.
- Call the elected official's office two days in advance and reconfirm your appointment. Try to find out how much time has been scheduled for it.
- If there are multiple people scheduled to speak during the meeting, coordinate in advance the order in which everyone will speak, who will speak about certain issues, etc. If some are constituents and others are not, have the constituents go first. Stay on topic and try not to have more than two items you want to discuss. Plan to be brief. No one should veer off into non-counseling issues.
- Plan ahead to ensure that you and your group will arrive at the office at least five minutes in advance. If you are going from meeting to meeting, make sure you have enough time between meetings to get there. This is important because you don't ever want the Legislator or their staff to think that you don't value their time.
- Try to learn if you are meeting with someone who already supports your issue/bill, in which case you will thank them for their support. If you find that they are undecided or against you, you will be trying to inform and persuade them. Keep in mind that your issue may be one they haven't considered before. Legislators in most cases add their support to a bill by co-sponsoring it; check the bill online to see if they are a co-sponsor.
- You can find your U.S. Senator at senate.gov by selecting your state. You can find your member of the House of Representatives at house.gov with a search using your Zip Code. You can also find them and your state officials at counseling.org/government-affairs/external-links.

At the Meeting: Use your time wisely.

- Have a one-page summary of the issue, your position and what you are asking for. Other material can be added as background. Bring enough copies of your information to the meeting so that everyone in attendance has one.
- When talking, be direct and to the point. Be specific about your "ask": "Please support/cosponsor (or



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oppose) Bill Number ____," or "Please help us to ____." An "I wanted to get to know you and tell you about our organization" meeting isn't usually as productive. Use common sense if you find yourself in disagreement; be polite, listen and don't interrupt.

- When talking about specific legislation, refer to it by its official title and number (For example, H.R. 3662: The Mental Health Access Improvement Act). If there is not a specific piece of legislation, be clear about the way the lawmaker can help your cause, perhaps by introducing a bill.
- Look for signs the meeting is going well (you are asked questions) or not (no questions, no notes taken, the closing of the notebook). If you sense that you are meeting with someone who just doesn't have a lot of time, wrap it up. Often Legislators don't know when votes will happen and staffers have many unexpected things come up in a day that disrupt their schedule. They tend to have more meeting requests than they are really able to deal with when Congress or the State Legislature are in session.
- This is one of the most important parts of the meeting: Be sure to add personal accounts of how this piece of legislation affects you, your family or someone that you know.
- Find ways to show that what you are asking for helps the Legislator's district or state. Job creation or job retention are always important considerations. So is saving the government money. Always look for ways to frame requests with one of those, if possible.
- Offer to provide letters of support from yourself and as many people and organizations as possible. Lawmakers like to have something that shows that their constituents asked them to take a particular position, in case opponents later say: "Why did you support that?"
- Remember that YOU are the EXPERT on the counseling side of an issue and you will know more about the counseling side of it than the Legislator or their staffer. Also remember that they don't expect you to know everything about an issue or the entire legislative process. Offer to be a resource for them on counseling issues. If you are discussing an existing bill, they should be pleased to be able to learn about it from you. If you are asking for help with

an important matter that isn't a bill, they should be happy to have the opportunity to help, especially if you are a constituent.

- Feel free to ask questions.
- At the end of the meeting, be sure to thank the Legislator or their staffer for their time and suggest follow-up actions. Offer to send them any additional information that pertains to the issue.

After the Meeting: Follow up with your Legislator or staff member

- If you are with a larger group that met with different individuals during the day, get together afterward and share what you learned, including which Legislators and staffers seemed helpful or not, what you learned about the prospects for your bill, etc. Create a one-page evaluation sheet for each meeting to help preserve that information. If getting together isn't possible, designate someone to receive everyone's meeting results.
- Send the Legislator or the appropriate staffer a thank-you letter by mail or email. Thank them for agreeing to do whatever they agreed to do.
- Don't hesitate to remind them later if they haven't followed through on an action item. Sometimes you just need to bump things up on their to-do list.
- Stay in contact with the Legislator and the staffer you spoke with. Send an article that would be relevant to your conversation, for example. This ensures that there will be an open line of communication, if and when you would like to set up a meeting with them in the future.
- If you met with your lawmaker in Washington, D.C., or in the state capital, get to know someone in their local office who also handles your issue. They will not be as directly involved with legislation, but they still can help you.
- Look for opportunities to attend events or town hall meetings with Legislators when they are in your area or neighborhood. This will help them get to know you and remember what you're interested in. They are more likely to help if they think they will keep running into you.