



Tips for Working With Legislators

Researching Legislators – Information to Gather

Why do you want to work with this legislator?

Member's Legislative Interests

- Committee Assignments
- Bills sponsored or co-sponsored
- Statements of Interests
- Positions
- Caucus

Personal Interests and Background

- Any board positions?
- Former jobs held
- Personal stories or experiences that shape interests?

Media Coverage

- Featured in stories about which issues?
- Authored op-eds on which issues?
- Attended certain events by organizations (and what kind), on certain issues, etc.

Other Connections

- Does one of your board members or donors know him/her (or his/her staff)?
- Do you or does someone in your organization have a connection to a member of his/her family?

Requesting and Setting Up a Meeting

- Ask to speak with the scheduler in the Member's Office
- You may need to follow up
- You will likely get a meeting with the staff, not the Member – that is OK, you'll likely get more time with staff

Outline for a Successful Meeting

Remember to be on time and respectful of the time allotted for your meeting. Careful planning will help you make the most of that time.

- Introductions
 - Thank staff for the meeting and their time
 - Introduce yourself and other meeting attendees
 - Swap business cards and materials

- Who You Are and What You Do
 - Describe your program or organization briefly and clearly
 - Stick to what's important to the Member
 - Why does the work matter?
 - Talk about who you help
 - Summarize purpose of visit
 - Additional tips:
 - Try to keep this to a few minutes
 - Use details and examples
 - Use a constituent's story that pertains to the topic of your visit
 - What specifically resonates with this member – you may not be able to talk about all you do – so address the program that ties to your ask

- The Ask – the request you make of the Member or her/his office
 - Action – a task the policymaker can do
 - Linked to policymaker's interest
 - Helps you with your work
 - May or may not be tied to legislation or lobbying (*When planning your ask, clarify your organization's status regarding lobbying first*)
 - Examples:
 - Convene local leaders
 - Speak at an event
 - Tour your facility/organization/local health clinic
 - Make an introduction to state or local officials
 - Navigate an issue in state or federal government
 - Write an op-ed on an issue important to the Member and your organization
 - Introduction to local office
 - Support or oppose legislation (*Note: this is a lobbying activity, so be aware of your organization's status before making this kind of ask*)

- Closing
 - Identify next steps
 - Thank yous

- Follow Up
 - Send a thank you email
 - Send any additional materials or resources promised during the meeting
 - Stay in touch with DC and local staff by sending future information related to the issue