

Best Practices for Successful Meetings with Elected Officials

Prior to the meeting

Prepare. Know the issue you wish to discuss, your goal for the meeting, or the action you want the legislator to take. This includes preparing a few compelling anecdotes or facts to convince them that action is needed on a particular issue.

If you are communicating with an elected representative or their staff, it is important to research their background. Prior to your communications with the member, you should be able to answer the following questions:

- What party do they belong to?
- What committee(s) do they sit on?
- What is their legislative record on the issues I care about?
- What issues do they care about?

Select the appropriate attire. When meeting in-person, business professional attire (e.g. suits) is the norm in legislative buildings. When meeting virtually, business casual attire is acceptable (e.g. button-up shirt, blouses).

During the meeting

Step 1: Introduce yourself.

- **Be concise.** Keep your discussion simple and short. Especially if meeting with the officials in person, you may have as little as 5 minutes to talk with them before their next appointment. Meetings with legislative staff usually run 15-30 minutes.
- **Focus on your objective.** What specifically do you want to accomplish? This could include raising awareness of a specific issue or your role/value, increasing your involvement/effectiveness on an issue, building support for specific policy/resource needs, or expanding your leadership role.
- **Show how your insights are relevant.** In one or two sentences, explain how the issue affects your life, your work or your community.

Step 2. State the issue.

- **Rely on facts, but personalize.** Use “I” statements and cite specific times and examples. For example, give anecdotes about a situation that happened to you or your client, that would have had better outcomes if the proposal you are advocating for were in place. When appropriate, cite the bill number of relevant legislation (e.g., H.R.1234 or S.3456).
 - Strengthen any anecdotes you share by tying back to population statistics, scientific findings, etc. For example, explain that while the anecdote you shared

was about a single individual, national statistics find that X percent of the population has a similar disorder, background, etc.

- **Be honest when you do not have an answer.** Doing so will build a more trusting relationship with legislative offices than if you guess and give an inaccurate answer. If you do not have an answer, offer to research the topic and follow up by email with a response. APA is always happy to assist you in your follow up.
- **Be courteous.** Avoid emotional arguments, personal attacks, threats of political influence or demands. Be positive about your issue and offer recommendations about how you want the office to address concerns. If the office is not ready to engage on the topic you are discussing, attempt to find common ground on a different issue.
- **General tips:**
 - Use audience appropriate language; avoid acronyms and technical language
 - Briefly describe your role/relevant skills. Remember that you are especially important to your elected officials because you are a constituent and/or expert, and because you have a unique view of the effects of proposed state/federal policy or legislation.
 - Use effective message structure. The direct relationship between problem, action, benefit is critical to comprehension.
 - Problem (the issue you are trying to help address)
 - Action (what you suggest can be done; your role in doing it)
 - Benefit (improved outcomes for all parties involved)

Step 3. Wrap up.

- **If there is time, ask questions.** Ask for the office's point of view, if they would be willing to support your issue, or how the official plans to vote on relevant legislation.
- **Offer yourself as a resource.** Ask if there are any issues relevant to psychology on which you could help, and provide your contact information.
- **Show appreciation.** Remember to thank officials and staff for their attention.

After the meeting

Thank the official and/or their staff for taking the time to meet with you. Follow the issue you discussed during the meeting, and be sure to follow up with the office at key times. For example, if the bill you are advocating for comes up for a vote, remind them of your conversation and urge them to vote yes. Always be sure to [thank the officials](#) or their staff for taking positive action on the issue at hand, including becoming a co-sponsor of key legislation, sending a letter to the Administration or governor urging a certain course of action, or voting yes on legislation.

Remember: The APA Services Advocacy team is here to help.

We can help you identify key offices and staff, tell you about recent developments or votes, and give you an insider look at the best approach to take based on the current policy or political climate. We can also let you know about future advocacy training opportunities, including virtual advocacy summits or fly-ins.

Email: advocacy@apa.org

Sample thank you note:

Dear [Name of Staffer/Legislator]:

Thank you so much for taking the time to meet with me [and additional participants] on June 15th regarding policies to protect children online. We are heartened by the interest Congress has shown in these issues and hope your office will lend support to the proposal we discussed during our meeting, described below.

[Co-sponsor / Become an original co-sponsor] of the Kids Online Safety Act (S. 1409). APA Services is working to identify co-sponsors for this legislation in the Senate, and original co-sponsors for companion legislation in the House, which we hope to be introduced soon. This request would create a duty of care for social media platforms to mitigate risks and increase safeguards for child and adolescent users, as well as facilitate research on social media's effect on youth. This legislation is important – research demonstrates that adolescents' exposure to online discrimination and hate predicts increases in anxiety and depressive symptoms, among other mental health harms.

Please do not hesitate to contact me if you have any additional questions or require more information. We look forward to continuing to work with you to address the mental health needs and online safety of the next generation.

Again, thank you for the opportunity to meet with your office.

Sincerely,

[Name/Title]

[University/Institution]

[Address]

(Phone: XXXX)

Tips for Follow Up

It takes sales people an average of 13 tries with a prospect before making a sale, and Congressional/state legislative offices offer similar challenges. Consider the multitude of asks from diverse groups across industries that legislators are bombarded with. What you can do to make your message stand out? Be both patient and persistent; don't be discouraged if Congressional/state legislative offices ignore your first request for a specific action. Offices are often juggling numerous competing priorities and a lack of response should not be interpreted as lack of caring. If you don't hear back after your first request, reach out again to (a) remind the office of your original request and (b) demonstrate that you are serious. Be persistent and keep asking until you get an answer!

Following up after your meeting is just as important as the meeting itself. It can be easy for legislators or their staff to forget about your issue when they have so many other important bills and topics to worry about. You should email the legislator and/or the staff member that you met with shortly after your meeting, thanking them for taking the time to meet with you. Be sure to include any clarifying information and additional materials that the office requested during the meeting. Continue to follow up with the legislator and their staff throughout the session as needed as the bills you are working on move along in the legislative process.