



Guide to Meeting with Legislators

Meeting Goals

Specific meeting goals may vary according to the issue for which you'll be advocating, but you should always aim for the following during each legislative visit:

1. Educate policymakers about Micro Enterprise and our mission.
2. Advocate for policies that support Micro Enterprise.
3. Convince the decision-maker to support your position.

Meeting Checklist for effective meetings

1. Research relevant information about the targeted legislator.
2. Research the issue.
3. Schedule the meeting.
4. Create a meeting agenda.
5. Prepare for your meeting.
6. Develop materials to distribute during meeting.
7. Conduct an effective meeting.
8. Follow up.

Important websites to bookmark

Find your state legislators, information about bills: <http://www.legislature.ca.gov/>
House of Representatives <http://www.house.gov/>
Senate <http://www.senate.gov/>

1. Get relevant information about the legislator. Much of this data can be found on the legislator's website.

- What is the legislator's district? Is it a rural, urban or suburban district?
- How long has s/he been in the legislature?
- What is his/her background: upbringing, education, financial assets and previous experiences?
- What issues does he/she identify as priorities?
- What committees does he/she sit on?
- What is his/her voting record on related issues? Votesmart.org is a good resource to find previous votes.
- What are the political influences in his/her district – labor, business, farmers?



2. Do your homework.

- Contact Heidi Pickman (hpickman@microbiz.org 415-992-4484 (or respond to CAMEO call) for information regarding legislative goals including current resources for current legislation, talking points, fact sheets and bill updates.
- Be able to demonstrate basic knowledge of and compelling reasons to support the initiative. If it is a piece of legislation, you should know:
 - The bill number and its status in the legislative process,
 - What committees it has been referred to, and
 - Which groups are supporting and opposing the bill.
- Familiarize yourself with the opposition's arguments; develop reasonable responses to them.
- Personalize the issue; know how the issue affects people in the district.

3. Schedule the meeting.

- Call to schedule the meeting. Depending on legislator's accessibility and time of year, you may need to schedule anywhere from two weeks to two months in advance.
- Send written request for a meeting to the legislator's scheduler. Always be sure to follow up a written request with a phone call to confirm receipt.
- If a legislator is unavailable, ask to speak to the chief of staff, legislative director or the staff member who tracks the issue.

4. Create a meeting agenda, limited to one topic and let the scheduler know what it is.

- Sample Agenda:
 - Introductions
 - Thank you for past support
 - Update on organization/activities
 - Issue/campaign update
 - Legislator's feedback on campaign
 - Ask the legislator for a firm commitment
 - Create follow-up opportunities
 - Thank legislator and/or his/her staff

5. Prepare for your meeting.

- When possible, bring three or four other constituents. Together you'll enhance your clout by conveying the extent of concern throughout the legislator's constituency.
- Assign a group leader to open, facilitate and close the meeting.
- Assign each person a role to play: e.g., note-taker, leader, topic leader, follow up.
- Brief all constituent participants a day or two before the meeting.
- Call the legislator's office to confirm the meeting.

6. Develop materials to distribute during meeting.

- Prepare a brief one-page fact sheet or position paper:
 - List the names and contact information for each person attending the meeting;
 - Summarize the agenda items;
 - Highlight specific action requests; and
 - List co-sponsors and supporters.
- Bring CAMEO literature
- Bring other appropriate literature to support your issue, such as:
 - Press clippings
 - Reports and studies

7. Conduct an effective meeting.

- Never keep the legislator waiting; arrive 5 to 10 minutes early.
- Greet the legislator with a firm handshake.
- Project an image of self-confidence and be assertive in your delivery.
- Get right to the point and stick to it.
 - Be cordial, but remember your time is limited.
 - Don't let the legislator sidetrack you from the issues you want to discuss.
- Ask the legislator for a firm commitment.
 - Do your best to get a direct answer/commitment.
 - If the legislator says "I'll get back to you" or "I'll think about it," arrange a time to check back.
- Make an effort to determine the reason a legislator is not supporting your position.
 - Why won't they co-sponsor/sign on/vote yes on your bill?
 - Don't take rejection personally.
- Maintain your credibility.
 - If you don't have an answer, it's OK to say so and follow up with a written response.
 - Don't promise anything you can't deliver.
- Take notes.

8. Follow up. No matter the outcome of the meeting, always follow up.

- Get any additional information that was requested.
- Write/send a thank-you letter to the legislator and staff.
- E-mail/fax/call CAMEO with a meeting report addressing the following:
 - Which legislator's office did you visit?
 - Did you speak with the legislator and/or staff?
 - What was their general rapport? Did they listen carefully? Were they engaged in the conversation? Did they have any questions?
 - What were the key points/themes? For example, concerns with the bill's approach and/or language.
 - What materials did you give them?
 - What's their position on the bill?
 - Did they have any follow-up questions?
- Get to know the legislator's staff. Often, your relationship with the legislator's staff is as important as the one you establish with the legislator.
 - Thank staff whenever they have helped or assisted you.