

Tips for Meeting with Legislators and Staff

BEFORE THE MEETING

- **Research Your Legislators:** Conduct research on the legislators and staff you plan to meet with ahead of time. What personal, legislative or press activity has the legislator engaged in regarding philanthropy? Any of these could potentially open the door to support.
- **The Staff is Valuable! :** If the member cannot attend, still meet with the staff person. Try to make it a meeting with the lawmaker's Legislative Director or Tax Aide. They can be your best advocates!!
- **Plan Before the Meeting:** If you're attending the meeting with a group, please make sure you meet (either in person or by phone) beforehand to plan the meeting and pick a spokesperson.
- **Know Your Issues:** Have a strong familiarity of the issues and focus on no more than three during the meeting. For additional issues, put it in writing.
- **Limit the Size of Your Group or Delegation:** Five at most for House meetings, larger groups are okay for Senate meetings. This gives everyone a chance to talk and participate in your limited time.
- **Prepare a "leave behind" folder:** Include issue papers, contact information, news clippings, etc., but most importantly keep it brief! If you are not willing to read all of the materials, the member or staff will likely not be willing to read the materials.
- **Meeting Attire:** Wear professional attire – something that would be appropriate for a job interview, but be sure to wear comfortable shoes as you likely will be doing quite a bit of walking.
- **Be Punctual:** Members of Congress have busy schedules. If you are late, your meeting will be shortened or cancelled. But don't arrive more than five minutes early! Office space on Capitol Hill is cramped and offices cannot accommodate early arrivals.
- **Call Ahead:** if you are going to be late or have to cancel the meeting.
- **Congressional schedule:** The congressional schedule is very fluid and members of Congress and staffers are often pulled away for last-minute, unplanned activities that are not known in advance and, as such, your meeting could be delayed or bumped.
- **Space on Capitol Hill:** is at a premium, so your meeting could take place in the office reception area, in the hallway or downstairs in the coffee shop.

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- **Last minute Changes:** Do not take any last minute meeting changes personally and make sure you always are gracious and flexible.
- **Relax:** Don't Be Nervous! Remember that your member of Congress should be more nervous than you are – you are electing him or her after all!

DURING THE MEETING

- **Flow of the Meeting:** During the meeting, provide brief introductions (1-2 minutes), then go right into key message points.
- **Provide a Personal Story or Real-life Illustration:** These are more memorable than statistics.
- **Briefly cite statistics:** particularly any local, regional or state data to support your case.
- **Be concise and honest:** about the issues and the solutions, and make clear the relevance of the issues to their constituents.
- **Its OK to Say "I Don't Know":** Your member of Congress or his/her staffer may ask you a question you do not know the answer to. Politely say "I don't know" and promise to follow up. Don't make something up!
- **Don't forget the "ASK":** Most important part of the meeting!! Ask your member of Congress to contact you if new legislation is introduced.
- **Be a Resource:** Offer to be a resource to your Senator or Representative.
- **Exchange Contact Information:** Don't forget to get staff business cards!
- **Make the connection:** This is good for follow up.
- **Contact List:** It's good to include a list with names and contact info in your leave-behind folders.

AFTER THE MEETING

- **FOLLOW UP!!!:** Be sure to follow up with the legislator's office or contact the Council on Foundations to follow up for you.
- **Engage the Media:** Don't forget to reach out to your local media to tell them about the meeting. The Council on Foundations has template opinion pieces and press releases for you to use at www.foundationsonthehill.org/media.asp.

Questions? Please contact Chatrane Birbal at the Council on Foundations, at chatrane.birbal@cof.org