

HOW TO Have Successful Meetings with Legislators and Their Staffs

by Jenny Parker and Beth Olson
Based on content by Deece Eckstein

If you're like most people, the prospect of visiting a lawmaker's office about an issue or a bill sounds like as much fun as public speaking or getting your teeth cleaned...but there's no need to be nervous!

This handout gives you the pointers you need to make sure your meeting goes as well as it possibly can.

Meeting in person with legislators and their staffs is a crucial part of citizen leadership, so it's worth taking the time to do some advance preparation.

Is it Lobbying?

Your legislative meeting is lobbying if you are advocating a position on a bill or an idea that might become a bill. It's not lobbying if you are just visting in broad terms about a policy issue, but it's also not as effective.

Lobbying is a legitimate exercise of free speech—and citizen input is a crucial aspect of the American legislative process.

Lob'by v. To conduct activities aimed at influencing public officials and especially members of a legislative body on legislation; to promote or secure the passage of legislation by influencing public officials; to attempt to influence or sway a public official toward a desired action.

Webster's Dictionary

Helpful Hints for Meeting Success:

- Dress appropriately to be taken seriously.
- Start positively—thank the legislator or staffer for meeting with you.
- Introduce yourself and identify your hometown.
- Know your agenda and stick to it. Don't get caught in the small talk.
- Listen to the elected official—what you learn about their thinking is extremely important. Ask questions that require specific answers. Elected officials may try to shift the conversation to a more comfortable topic.
- Tell the Truth! If you don't have an answer, say so! Respectfully tell the legislator that you do not know the answer to their question but that you will find out the answer and contact them.
- Don't inflate your political clout or threaten not to vote for a member.
- Acknowledge the possible political risks. Help the official develop bridge-building messages that can speak to the majority of their constituents.
- If you hit a wall during the visit and cannot make any headway with the legislator, accept it and politely excuse yourself. After the meeting, brainstorm creative solutions.
- End on a positive note by thanking the legislator or staffer once again for taking the time to meet with you.

Before the Meeting

1. While you can go by yourself, you might want to consider building a team to meet with your legislator. Not only does this make the visit less intimidating, you will each fill different roles in the meeting.
2. Write a letter requesting a meeting. The letter should be properly addressed and should include the following elements:
 - Introduction of yourself, your organization, and where you are from
 - Request for a meeting
 - Topic for the meeting
 - Your position and talking points
 - Proposed meeting times
 - Request for follow-up action
3. Call the office to follow-up. Ask to speak to the staffer or aide who handles the legislator's schedule. Schedule a time to meet. Your request should be for no more than 15 minutes.
4. Research the legislator's background. Find out as much as you can about the legislator.
 - What motivates this legislator?
 - Did she/he have an opponent in the primary or the general election?
 - Do you have points of commonality (e.g. go to the same school, or are in the same political party)?
 - Check bills filed by the legislator, press releases sent out by her/his office, newspaper articles about your legislator, etc.
5. Role-play the meeting with your group. You each will fill different roles in the meeting and you should each prepare for those roles.
6. Prepare information for the legislator. Don't get carried away with literature. Give them a one-page fact sheet and a copy of the bill.
2. If for any reason you are late or miss your appointment, remember to call the member's office, ask for your contact, and apologize.
3. Be prepared to ask and answer questions on your topic of interest. Make conversation! During your meeting:
 - Personalize your involvement with the issue. (i.e., "As a public school student, I...").
 - Provide the member/staffer with a handout.
 - Give others in your meeting time to speak.
 - Listen carefully to what the member has to say, even if you disagree.
4. Senators' and representatives' schedules change daily and may have an unavoidable conflict with your meeting time. If this happens you will probably meet with a staffer. In many ways, the staff is the member. A state official relies on his/her staff to answer mail, write speeches, develop position papers and advise on day-to-day issues. The staffers are very valuable, so use the time you have to meet with them wisely.
5. Assume that the time allotted by the legislator's office is "the real time"--don't assume that once the meeting begins, you can extend the meeting time. (However, it often turns out that if a meeting is going well, you may get more time with the legislator than you expected.)
6. Learning to follow up an appointment in writing is an important leadership technique to develop. If you would like to write a note, you should thank them for their time and reiterate a point/comment they made that you found most interesting. It would probably be best to address your note to the staff member you had the most contact with during the meeting.

The Meeting

1. Arrive about five minutes early for your appointment. When you get there, introduce yourself to the receptionist; let him or her know the time of your appointment and your contact's name in that office. Feel free to sign the guestbook.
7. Ask the staff member for a business card so you will have a reference for future contact with the office and to write a follow-up note after the appointment.
8. Don't be nervous! Members and staff love meeting with citizens from their districts.

Get fact sheets on your issues from advocacy groups. Many organizations post fact sheets on their websites. If you are meeting about a bill that has already been filed, download the latest version from the state website.

Downloading bills from the Texas Legislature's Website

If you know your bill number, go to http://www.capitol.state.tx.us/tlo/legislation/bill_status.htm. You can download and print the bill text, as well

as supporting information like the fiscal impact statement. You can also check where the bill is in the legislative process and sign up to be notified of any actions taken on the bill.

If you don't know your bill number, go to <http://www.capitol.state.tx.us/tlo/billsrch/criteria.htm>. From this page, you can find your bill by author or other identifying information, or even search for bills relating to a particular subject that interests you.

The "ASK"

The most important role in the visit is THE ASK! Someone must ask the legislator for an appropriate level of support. THE ASK will be different depending on the legislator. The common ask is,

"Can we count on your support for this bill?" Others asks include:

- Will you cosponsor this legislation?
- Will you give us a committee hearing?
- Will you author this bill?

Sample Letter for Making a Legislative Appointment

Dear Representative (Senator) _____:

My name is _____ and I live at _____. I would like to request an appointment with you or a member of your staff on (date). I would like an opportunity to discuss with you (the issue or bill you want to discuss).

Please respond to me at (list phone/fax/e-mail contact information).

(Add any other personal information/ comments that might be appropriate.)

Sincerely,

(give your name and full address)

Contacting Your Legislator's Office by Mail

For any Texas state representative:

The Honorable John Doe
P.O. Box 2910
Austin, Texas 78711

For any Texas state senator:

The Honorable Jane Doe
P.O. Box 12068
Austin, Texas 78711

Sample Phone "Script" for Making a Legislative Appointment

Hi! I'm _____, from _____. I will be in Austin on (date), and would like an appointment to meet with Governor _____/ Senator _____/ Representative _____ to discuss (the policy issue or bill you want to discuss).

I would be more than happy to meet with the legislative assistant who works on (your issue) if the (elected official) is unavailable. Is someone available the afternoon of the (date of your visit)?

If no one is available, I would like to drop by the office anyway to leave some information for the (elected official) to review.

Contacting Your Legislator's Office by Phone

Find your state representative's phone

number on the Texas House of Representatives website at <http://www.house.state.tx.us>

Find your state senator's phone number on the Texas Senate website at <http://www.senate.state.tx.us>

No internet access? Call Capitol information at 512.463.0063 for any legislator's phone number.

ROLES: Yours and Theirs

If you are going with a group to your legislative meeting, arrange ahead of time which role each person will play. If you have time, it's a good idea to do a roleplaying exercise, especially if one or more members of the group are inexperienced.

Facilitator—Introduces the group and manages the flow of conversation. The facilitator should also know the bill well and be able to comfortably discuss the talking points for the group.

Personal Stories—One or two people should share their personal reasons for supporting the bill or issue.

Note Taker—Someone should always focus completely on taking notes of what the legislator says. This person is usually silent during the course of the meeting. Their only job is to write down everything that goes on.

Silent Supporters—In large groups, not everyone will speak. Some people can be there just to lend their support and show strong constituent support for the legislation or issue.

The legislator's staff have roles, too. Knowing who you're meeting with will help you prepare.

Chief of Staff: oversees the member's staff in the Capitol office and sometimes also in the district office. Often a key political advisor to the legislator.

Executive Assistant: Handles appointments and scheduling, helps the chief of staff with office administration, keeps things running smoothly.

Legislative Director: Supervises the legislative staff, responsible for legislative proposals, floor work, issue oversight, etc.

Legislative Assistant: Typically track specific issues areas and bills the legislator authors that fall in those issue areas.

Press Secretary: Publicity director; responsible for preparing press releases, speeches, etc.

District Staff: Sometimes function only in political capacity, in other cases handle policy issues. Legislators who live in or near Austin typically do not have separate district offices, but do all their work at the Capitol.

Deece Eckstein is Executive Director of People for the American Way's Texas office. Previously he was chief of staff for Texas Senator Rodney Ellis and a member of the Texas State Board of Insurance.

Beth Olson is Public Policy Ministry Assistant with the Christian Life Commission of the Baptist General Convention of Texas.

Jenny Parker is a Public Policy Intern with Texas Impact.

For more information about the topic of this handout or to find out more about the Get F.I.T. Know-How series, contact Texas Impact at 512.472.3903, or email us at info@texasimpact.org.

The Get F.I.T. Know-How series is produced with the generous support of Methodist Healthcare Ministries of South Texas. "Serving Humanity to Honor God." www.mhm.org



TEXAS IMPACT
people of faith working for justice

Texas Impact is a grassroots network for Texas religious communities. Our members include regional and statewide religious organizations, local congregations and alliances, and individuals.

Texas religious leaders established Texas Impact in 1973 in the wake of a major scandal that shook state government. Texas Impact's founders wanted people of faith to involve themselves in government and influence state leaders to direct their attention to the needs of people rather than their own selfish interests. Those founders knew that acts of charity alone are not enough to break the cycles of poverty, injustice and hopelessness.