Tips for Working With Legislators

Resarching 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

*Community Catalyst* is a national non-profit advocacy organization building consumer and community leadership to transform the American health care system.

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