

## **Best Practices**

## **Meeting With Elected Officials**

Most lawmakers welcome the opportunity to meet with constituents and issue experts and are willing to listen to their information. Prior to the meeting, please connect with your American Heart Association <u>Grassroots Manager</u> to receive the latest information on the issue. Then familiarize yourself with the information you plan to share.

- Learn how your elected officials operate. Some don't have offices or staff, so keep this in mind.
- Receptionists and staffers are your allies, too. Get to know their names and ask for their email addresses, so that you can thank them for their help.
- Persistence and follow-up are often required.
- When meeting with your member of Congress, an in-district meeting is not only fine it's often preferred. This can also be true for state lawmakers.
- If your lawmaker is in a leadership position, it will be challenging to get a meeting directly. So you'll likely meet with their staff they are just as important.
- If you've met with an aide, feel free to ask if they would help you set up a future meeting directly with the lawmaker next time.
- If your meeting is virtual, be sure to determine the best technology platform for you and the lawmaker's office and identify who will set up the meeting link.

## **Meeting Elements:**

- **Before the meeting:** Arrive 5-10 minutes before your appointment. Review your talking points and request. If you are meeting with a group, discuss what each person will contribute. Assign one person to begin the meeting and one to end the meeting.
- Introductions: Everyone should briefly introduce themselves at the start of the meeting. Highlight if you are their constituent.
- **Sharing your story:** Share your personal story or experience and why this issue is important to you. This will help put a face to the issue. Provide some basic statistics or data and how the issue impacts the district.
- The request: Clearly state your "ask" and request a commitment. Listen carefully to their response and stay focused on your message. \*If you don't know the answer to a question, say you'll follow up with more information and connect with your <u>Grassroots Manager</u> after the meeting.
- Closing: Make sure you thank the lawmaker, request a photo with them and a business card so you can follow up.

## Remember these meeting tips:

- Stay positive and on message, even if your lawmaker disagrees.
- Focus on association priorities and save other issues for later.
- Use bridging to stay focused (e.g., "That's interesting, but today i'm here to discuss...")