

Hi, this is Chris Micheli with the Sacramento governmental relations firm of Aprea & Micheli, and an adjunct professor at McGeorge School of Law.

Today's podcast is to provide some explanation of how to have effective meetings with legislators and staff. Whether you're a lobbyist or a constituent, it's important when advocating for your position to have effective meetings with elected or appointed officials, as well as their staff.

In broad terms, you should consider some of these factors that may influence elected officials and their staff. For example, personal relationships, your message or messages, and the use of constituents are all important factors, among others.

Before we get into the specifics of having effective meetings, you should be aware of basically two types of meetings with elected or appointed officials, as well as their staff, what I call relationship building meetings and policy meetings.

So, what are the distinctions between the two?

Relationship building is an important first step prior to meeting on a policy matter, such as a bill or a regulation. What are some examples of relationship building?

Taking a legislator or his or her staff for a tour of your facility. Having a legislator write an article for your organization's newsletter or website. Writing an article on your legislator, posting it on your website. Or perhaps hosting your official for a town hall or get together.

Policy meetings are used to discuss public policy issues such as specific bills, regulations, issues, or to seek an official act. What are some examples of policy asks of elected officials?

Some examples would be to introduce a bill, to coauthor a bill, vote for or against a measure, perhaps talking with another legislator about a bill or issue, or even getting information from or talking with a regulatory agency.

What are some of the steps we should take to ensure an effective meeting? Prior to a meeting, during the meeting, and after the meeting is the way I've distinguished some of my points.

Let's start with prior to the meeting. Prior to an official meeting, you need to schedule an appointment and prepare for that meeting. This will usually occur two to three weeks in advance.

Also you need to determine whether the meeting will occur at the official's capitol office or the district office for an elected official.

When contacting an elected official's office, ask to speak with his or her scheduler, and be prepared to offer several dates and times that you can meet. Provide a list of individuals who will be attending the meeting, and don't be surprised if the scheduler asks you to fax or email a formal meeting request. Some even utilize a form.

For legislative meetings, and assuming that you're in Sacramento, then the capitol office is most likely the appropriate venue. On the other hand, if you can't go to Sacramento, due to cost or

time constraints, and you're a constituent, perhaps a meeting is more appropriate in the district office.

If the legislature is in session, as they are for eight months of the year, such a meeting is most likely to occur on a Friday when the legislature is out of session, and the legislator is in his or her district.

Now prior to the meeting, you need to determine what specifically you're going to ask for. Asking for something specific is one of the key ways to get the attention of your official or staff.

Making a clear and concise request will help make your meeting that much more effective. In addition, before you meet with your elected official, it's important that you take time to learn about the official, and his or her public policy priorities.

Knowing who your elected official is and why you're meeting with him or her is critical. Most of the information you'll need can be found on the website for this legislator.

So, what are some topics that you might want to research? What did the official do before getting elected to office? What are his or her stated policy interests or goals? What was his or her campaign platform?

What are the priority issues for his or her district? What's their legislative record? What types of bills have they introduced or carried? Which legislative committee does he or she sit on? What's the political party of the elected official? Who has the elected official major supporters in the past campaigns, who have they been?

Then of course determine any role for yourself and the other meeting participants. Is everyone from the same organization, or are they from the same industry? If there are multiple persons, you should first designate a group leader, who should open and close the meeting. Then perhaps each person in attendance can present a key message or thought.

Now, particularly if there's a group of individuals meeting with the elected official, then it's wise to prepare and practice for your meeting. A short dry run or run through of what everyone is prepared to say is always helpful.

It's important for the group leader to set the tone of the meeting at the outset and ensure that the meeting runs on time and progresses, so that each individual has an opportunity to speak.

Of course, dress appropriately for the meeting. This is a business meeting, and you should dress in business attire.

Be sure to confirm your meeting a day or two in advance. You certainly don't want to travel all the way to the state capitol just to find out your meeting was canceled or rescheduled.

During the meeting, how should you conduct yourself, and how should you conduct the meeting? Naturally, always be polite in your meeting, even if you have hard feelings or are upset about a particular issue or vote.

Similarly, if you do not get the response that you desire, make sure that you engage professionally and politely with both the official and his or her staff. The meeting may not be successful in your mind, but hopefully your next one will be.

You do not want to upset the official or the staff when you need to meet with the next time with a new issue or request.

Naturally, always tell the truth, and do not mislead or threaten anyone in a legislative or regulatory office, or their staff. It will mark the end of your ability to have meetings with those individuals.

Do not discuss any political campaigning or contributions in legislative offices, or in any way be connected to official actions. Do not discuss anything political with legislative staff.

It's important to arrive on time to your meeting. Not too early, but definitely not too late.

Most of all, be flexible. For example, if the legislative office is full, and the staff has to hold the meeting in the hallway or another place, do not be phased. Similarly, if your meeting was scheduled with the elected official, but he or she is unavailable, happily take the meeting with the legislator's staff.

And if you cannot make your scheduled meeting, please be sure to call in advance to cancel or reschedule.

Next, personalize your message as much as possible. Particularly if you're a constituent, make sure that you explain why you are there, why you are well positioned to deliver this particular message, and why the official should care about your perspective as a constituent, by explaining the direct impact of an issue or a bill.

That is personalizing it. You'll have a much greater impact opportunity.

You do not need to focus on facts and figure all the time, but rather on why you care enough to explain your position to your elected official, and that you came to meet with him or her. If you have a particularly compelling story, tell it.

Now, when you begin your meeting, identify yourself and the organization, if any, that you're representing at the meeting. Explain that you're a constituent if that's the case, or whatever connection there might be for the purpose of the meeting.

Be specific in your request to the elected official. Do you want him or her to vote yes or no on a particular bill? Do you want them to write a letter or talk with a colleague? If your request or your message is too vague, then the official or his or her staff will likewise be general or vague in their response.

To be more effective in your request, you should be specific in your request. However, try not to make more than one request per meeting. If you must bring up more than one request or message or bill or issue, make sure that you prioritize them for the elected official and his or her staff. Also, you may get stuck with the least controversial or the easiest item on your list, instead of the more difficult request if you make multiple ones.

Finally, at the conclusion of the meeting be sure to leave a one pager, or a leave behind, with the official and his or her staff. Make sure that even if the staff is in the room that he or she gets the same information and hand out.

These materials need to explain your issue and what your message is. Be sure to include contact information with your materials, in case anyone has particular follow up questions for you.

After the meeting, you should send a quick note thanking the legislator and his or her staff or taking the time to meet with you. This will also provide an opportunity for you to follow up, to reiterate your message at your request, or to just let them know that you can be a resource to them.

And of course, be sure to acknowledge any position that the legislator has stated. For example, if he or she committed to vote yes or no on a particular measure.

Follow up is critical, especially because legislative meetings are often quick, and there are so many during the day for the officials and their staff. Be patient for any response from the office.

It also allows you to keep in touch after your meeting. Don't overstay your welcome and become obnoxious. But every few months, if there's ongoing issues, it's appropriate to be in touch with them.

Finally, be a resource to the elected official and his or her staff. For example, you may not be able to provide all the information you know about an issue in your short meeting at their capitol or district office.

So, you want to make sure they understand your experience and expertise, and that you can be a valuable resource in the future. If you're viewed as an expert in your field, then the legislator and his or her staff are more likely to ask questions and rely upon your expertise and experience and guidance in the coming months and years ahead.

Thanks for joining this podcast, to examine how you can conduct effective meetings with legislators and staff. I hope you enjoyed it.