Scheduling Meetings with Policymakers and Staff

SfN is here to assist you to set up an in-person meeting with your policymaker (or a member of their staff). Meetings help your issue stand out and are an important way to build relationships. While the Washington, DC staff focus more on legislation, making an appointment in the district office is a good option, especially during a Congressional recesses. Recess calendars are shared by leadership in both chambers and can be found on **senate.gov** and **house.gov**.

Whether you're scheduling a meeting in Washington, DC, or in your home district/state, the following tips will help you schedule and prepare for an appointment.

Setting Up a Meeting:

- Find the policymaker's office phone numbers on their official .gov website, and ensure you contact the intended audience, either the Washington, DC or district office.

- Ask to speak with the scheduler. Note that many offices will ask you to submit the following information and coordinate a meeting in an email or via their website (contact **advocacy@sfn.org** for help finding the right email address to use).

- Briefly introduce yourself (name/city/organization/research center) and emphasize that you are a constituent, including the town or neighborhood where you live.

- Clearly state the date(s) of your desired meeting and your intent to meet with the policymaker. Remember, meetings are likely no more than 20 minutes long.

- Be upfront about the issue you would like to discuss, and try to limit each appointment request to one issue.

- Always accept a meeting with staff if that is the only appointment offered. Staff members, especially in DC, advise policymakers on issues. You can request for the policymaker to stop by if the schedule allows.

- Don't be surprised if the meeting is rescheduled as last-minute hearings or votes may require the office's immediate attention. If you are traveling to DC for the meeting, underscore this with the office to try and minimize the chance of rescheduling or cancellations.

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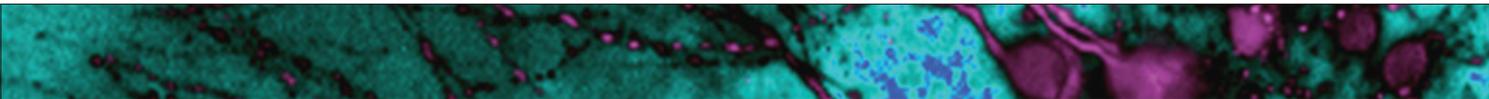
Scheduling Meetings with Policymakers and Staff (cont.)

Preparing for a Meeting

- Do your homework — determine whether your policymaker has taken an official position on your issue. A good place to start is their official website, **congress.gov**, as well as local and national publications. SfN can help to provide additional context or information.

- Identify relevant committees that your policymaker serves on. A list of committees they serve on will be listed on their official website.

- Prepare succinct talking points and key topics you want to cover. Meetings with policymakers and staff can be as short as 5–7 minutes.

- Bring relevant, but limited, information to the meeting that you can leave with staff. You can always follow up with more detailed information later should they request it. SfN has **a number of resources** for specific states or issues.

- Confirm the meeting a few days ahead of time and share information about what you will address. This helps the staff member or policy-maker prepare for the conversation in advance and will lead to a more productive dialogue.

- Arrive to the meeting on time, but not more than 10 minutes early.

- Get the staffer's business card and bring your own to share them with the person at the front desk and all attendees at your meeting.

- If you are active on social media share your experience. You can include photos from the meeting and tag your policymaker's social media handle (found on **govtrack.us**).

- Send a thank you note after the meeting.

After your meeting, it is important to send a follow-up email to the policymaker and their staff. This offers another opportunity to reinforce your key points and position. Be sure to follow up with SfN staff as well to share progress and outcomes to improve our coordinated efforts.

SfN partners are available at advocacy@sfn.org to help you prepare. Pick up the phone and schedule your meeting now!

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