



Scheduling and Conducting Virtual Meetings with Policymakers and Staff

SfN is here to provide guidance as you set up virtual meetings with a policymaker's office. Although in-person meetings are preferable, virtual one-on-one or small group conversations are important ways to build relationships and can be effective in helping your issue stand out.

Whether by telephone or videoconference, the following tips will help you schedule and prepare for a successful virtual appointment.

Setting Up a Virtual Meeting

- See SfN's Advocacy Best Practice "[Scheduling Meetings with Policymakers and Staff](#)" for how to get started as many of the scheduling processes (and meeting elements) are the same as in-person meetings.
- When calling, emailing, or submitting a webform, we recommend including the following information:
 - ▶ Briefly introduce yourself (name/city/organization/research center) and emphasize that you are a constituent, including your town or neighborhood.
 - ▶ Clearly state the date(s) of your desired meeting (remember that Washington, D.C., is on Eastern time, so always suggest your time request in ET; the easier you make it on the scheduler, the more likely you will get a meeting arranged), ask if a meeting with the legislator would be possible, and offer a direct phone number or pre-configured conference line/pin. Virtual meetings are likely no more than 15–20 minutes long (same as in-person meetings).
 - ▶ Be upfront about the issue you would like to discuss, and try to limit each appointment request to one issue — like the importance of funding neuroscience research or the role of animals in scientific discovery.
- Always accept a meeting with staff if that is the only appointment offered. Staff members are important advisors to policymakers on issues.
- Don't be surprised if the meeting is rescheduled. Policymakers and their staff are juggling many different issues, and another issue may require the office's immediate attention (like votes). If a meeting is changed at the last minute, express appreciation for the notice and immediately (but patiently) shift toward rescheduling. In your response, offer new dates and times that might work.

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Preparing for a Meeting

- Pre-meeting preparation and organization are critical. The policymaker or staff will likely rely on you to moderate the call — it is still best to start with short introductions of who is in attendance, why you are meeting, and thanking them for their time. You want to be prepared to stick to the agenda you developed, as well as your talking points. In addition to what you would do to prepare for an in-person meeting, the following considerations are essential:
 - ▶ Choose familiar, low-friction technology. Make sure you are comfortable with the platform — knowing in advance how to smoothly operate the conferencing system will alleviate last-minute stress and prevent delays.
 - ▶ Prepare succinct talking points and key topics you want to cover. Meetings with policymakers and staff can be as short as 5–7 minutes. This is especially important going into a virtual meeting – you want to be prepared but not too “scripted.” Try to keep the virtual meeting conversational.
 - ▶ Confirm the meeting at least one business day ahead of time by sending a confirmation email with: (1) the confirmed way to connect (whether by direct line, conference line/pin, or video conference) and (2) relevant, but limited, information about the meeting such as an agenda and materials you intend to reference. This helps the staff member or legislator prepare for the conversation in advance and will lead to a more productive dialogue.
 - ▶ Large attachments and hyperlinks can get caught in spam/junk folders. We recommend that your pre-meeting confirmation email consists mostly of plain text and possibly one image/pdf in the body of the email.
 - ▶ Following the meeting, you can always send more detailed information if they request it. SfN has [a number of resources](#) for specific states or issues.

Conducting the Meeting

- Make sure you are at least five minutes early for the appointment; this is especially important if you are the host of the conference line or videoconference room. Your guests should not be waiting in an empty room or conference line.
- Once the meeting has begun, we recommend the following format:
 - ▶ Introduce yourself and anyone else participating in the virtual meeting (name/organization/constituency).
 - ▶ Briefly state the purpose of the meeting and make the “ask.”
 - ▶ Share one or two anecdotes or personal stories to connect yourself and your organization/institution to the issue and why it is important to you.
 - ▶ Restate the “ask.”
 - ▶ Inquire whether they have any questions or need clarification.
 - ▶ Thank them for making time and let them know how you will follow-up.

After the Meeting

- If you are active on social media, share your experience. You can even include a photo of yourself on the virtual meeting or a graphic illustrating what the meeting was about. Tag your policymaker’s social media handle (found on www.govtrack.us). Ask permission from the meeting attendees before taking any photos or screenshots.

It is critical that you send a follow-up email to the legislator and their staff. This offers another opportunity to reinforce your key points and position. Be sure to follow up with SfN staff as well so that you can share key notes about the meeting to ensure coordinated efforts.

SfN partners are available at advocacy@sfn.org to help you prepare.