



**American Planning Association  
Planners Advocacy Week  
Tips for Successful Advocacy Meetings**

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Meeting in person with elected officials and/or legislative staff is the most effective means of political advocacy. Here are some important "do's" and "don'ts" to ensure that your lobbying meeting is successful and effective.

**DO**

**Make an appointment in advance.** Time is always at a premium in legislative offices. Contact the legislator's scheduler in advance to arrange a meeting. It is best to make your meeting request in writing and follow up with a phone call. Be clear about who will be attending the meeting and the specific reason for the meeting. Legislative schedules are unpredictable so don't be put off if your meeting is rescheduled or if you have to meet with staff in lieu of the elected official.

**Your homework.** Prepare carefully and thoroughly for your meeting. Take the time to "know" your legislator by reviewing past votes or statements on the issue, his/her party's position, and committee assignments. Develop an agenda that all your participants clearly understand. Know your talking points in advance and be prepared to make your case. Research the opposition's arguments against your position and, if possible, acknowledge and rebut those arguments in your presentation.

**Stay "on message."** Effective legislative meetings should be narrow in scope. Stick to a single issue, state only a few key points in support of your position and make a definite request for action. Many meetings are ineffective because a participant brings up other issues or strays from the key arguments supporting your position. Have a message and stick to it.

**Go local.** Your effectiveness is based on geography. Legislators want to hear your thoughts and opinions because you are a constituent. One of your most useful strategies is to relate the issue and your position to your community. Legislators have many other avenues to get national or state analysis. Local statistics and stories are important and you can be the only source for such rich information. Don't be afraid to humanize the issue by relating it to your local experience.

**Make a clear, actionable request.** Many people are afraid that it's impolite to make a direct request. But, don't forget that the purpose of your meeting is to secure support for your issue. It is appropriate and expected that you will make a request at your meeting. The key is to make sure that your request is clearly articulated and actionable by the legislator. Keep in mind that your request should be timely and consistent with the legislative process. It is usually not enough to ask for generic support for an issue or cause, rather make a direct and specific request that is tied to pending legislative activity (if possible). For example, ask that a legislator co-sponsor a bill. You should make reference to bill numbers and be knowledgeable about the status of the bill. Making a specific request gives you the opportunity to evaluate the legislator's response.

**Cultivate a relationship with staff.** Many grassroots advocates underestimate the important role of legislative staff. A supportive staff person can often make the difference between success and failure. Staff plays an invaluable role in shaping a legislator's agenda and position on issues. It is important that you make every effort to cultivate a

positive working relationship with staff. Over time, staff may even come to regard you as a helpful resource for information on your issue. Keep in mind that many staffers on Capitol Hill are quite young. Don't mistake youth for lack of importance and influence.

**Follow-up.** What happens after a meeting is almost as important as the meeting itself. Send a thank you letter after the meeting that not only expresses appreciation but reinforces your message and any verbal commitment of support made by the legislator or staff. If you promise during the meeting to get back in touch with additional information, be sure that you do so. Failure to follow up on your promise will call your credibility into question. Also, don't forget to report the results of your meeting back to ASLA or APA staff. This information is vital to coordinating overall legislative strategy and evaluating the impact of advocacy efforts. Stay informed on your issue and track how your legislator responds. Did the legislator follow through on his/her promise? If not, request an explanation. If so, express your appreciation.

## **DON'T**

**Go "off-message" or discuss unrelated issues.** You must deliver a unified message during your meeting. Sending different messages or discussing unrelated subjects will only undermine your ability to secure support. Limit your advocacy to a single issue. Legislators meet with many groups and constituents so it is important that your message and request be clear and uniform.

**Engage in partisan critiques.** It is best to keep the discussion based on the merits of the policy or issue. Avoid characterizing your position in strictly partisan terms. Worse, do not make snide or disparaging partisan comments. You are working on behalf of an issue, not a party. So, you want legislators of both parties to support your position. Be careful not to alienate legislators or staff based on partisanship.

**Use threats.** While it may be tempting to tell a legislator who has rebuffed your request that "you'll never vote for him/her again" or that "you pay his/her salary," such discourtesy only ensures that your arguments will be discounted — now and in the future.

**Be late.** Time is a valuable and scarce commodity for legislators. Punctuality conveys professionalism and demonstrates your commitment to your issue, which is after all the reason for the meeting. Arrive early and if you are meeting as a group allow time to calm nerves and make a final review of the talking points and message.

**Take offense about meeting space.** Capitol Hill offices are small. Most staff do not have an enclosed office. So, if the member's office or other meeting space is full, you may be asked to meet in the office lobby or even in the corridor. This is not an indication that you aren't being taken seriously. It is simply a reality of available space. Make the most of your meeting and don't be concerned about where it's happening. Similarly, because of the tight schedules of members of Congress you may be asked to meet as your Representative is in transit to a meeting or outside a committee meeting.

**Get too comfortable.** Advocates are sometimes surprised by the courteous reception they receive, even from lawmakers who disagree with their position. As a constituent you will be accorded respect by the legislator and staff. Don't mistake this respect for agreement. Don't let the comfortable nature of the exchange deter you from making your request. And, don't mistake "concern" for your issue with support.