Meeting with Policymakers
Back Home

- Why Meet back home?
- Step #1: Setting up the meeting
- Step #2: Preparing for the meeting
- Step #3: Conducting the meeting
- Step #4: Follow up
Meeting with Policymakers Back Home

Why Meet with Policymakers in their Districts/States?
Meeting with Policymakers Back Home

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* More time for a leisurely meeting
Meeting with Policymakers Back Home

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* More time for a leisurely meeting
* Keep policymaker busy
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* Local meeting, less travel, convenient
Meeting with Policymakers
Back Home

Why Meet with Policymakers in their Districts/States?

* More time for a leisurely meeting
* Keep policymaker busy
* Local meeting, less travel, convenient
* Bring in key people
Setting up the meeting

Initial Questions to Ask Yourself

1. Topic(s)?
2. Realistic ask?
3. Who should attend?
Setting up the meeting

Initial Questions to Ask Yourself

Requesting the Meeting

- Figuring out who/how to ask
- Providing the details
Setting up the meeting

Initial Questions to Ask Yourself

Requesting the Meeting

- Figuring out who/how to ask

- Providing the details
  - Your name and organization
  - When and Where
  - Topic(s)
  - Attendees
Setting up the meeting

Initial Questions to Ask Yourself

Requesting the Meeting
- Figuring out who/how to ask
- Providing the details

Follow up with scheduler, other
Setting up the meeting

Initial Questions to Ask Yourself

Requesting the Meeting

- Figuring out who/how to ask
- Providing the details

Follow up with scheduler, other

Set the date/time (double check address)
Preparing for the meeting

➢ Invite and Confirm Attendance
  o Experts
  o Board Chair/Board Members
  o Friends of policymaker
  o Beneficiaries/Clients
  o Concerned citizens
Preparing for the meeting

➢ Invite and Confirm Attendance

➢ Meeting Materials
  o One-pager
  o Nonprofit impact study
  o Petition
  o Letter
Preparing for the meeting

➢ Invite and Confirm Attendance
➢ Meeting Materials
➢ Conduct a Prep Meeting
  o Designate “opener” and “closer”
  o Spitball likely questions
  o Share relevant stories
  o Confirm Time/Date/Location; Attire; Materials
Preparing for the meeting

- Business cards
- Cell phone
- Business attire
- Camera
- A compelling story
Conducting the meeting

1. OPEN

2

3
Conducting the meeting

1. OPEN

2. Model Self-Introduction
   - Name, org., mission
   - Operations/people in district/state

3. Set tone of meeting
   - Ask what know of issue
   - Summarize issue or pass to next speaker to do so
Conducting the meeting

1. OPEN
   - Name, org., mission
   - People he/she may know
   - Why you care about the issue:
     - Impact on operations
     - Data
     - Story, anecdote
     - [Introduce/explain solution]

2. EXPLAIN

3. [Diagram of meeting process]
Conducting the meeting

1. OPEN
2. EXPLAIN
3. ASK!

• Don’t leave before asking for the policymaker’s vote
  o If with you, thank and ask for help with others
  o If against you or indecisive, ask what more is needed to convince
FOLLOW UP

✓ Debrief with participants
✓ Send thank you notes immediately
✓ Provide requested information
✓ Follow up again – when the issues are hot
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