



Best Practices for Successful Meetings with Policymakers

Meeting with a policymaker or their staff is an effective way to educate them about an issue and help inform their opinion. This document provides tips for faculty when meeting with policymakers or their staff.

Meeting Structure

INTRODUCTIONS of all meeting participants

- Provide your name, title, school/college, affiliations, and expertise
- Distribute your business card and collect staff business cards
- Thank them for the meeting; you know their schedule is busy and hectic
- Distribute written materials (“leave behind” information)
- Realize you will likely meet with a staffer. Staffers are well-informed, gather information for their boss, help shape boss’ views, and can offer you important advice
- If you are part of a trip scheduled by a professional society or association, make this clear



DISCUSSION

- Identify the issue you want to discuss, and why it is important to you, society, and the policymaker
- Focus on two or three key points; it is helpful if you have examples of regional, state, or legislative district impact
- Discuss real-life stories that illuminate statistics
- Outline potential cost savings, impact on populations and health, and potential policy considerations and options
- Avoid technical jargon and acronyms

ASK if the policymaker or staff has questions or feedback/views on the issue

- Staff and policymakers often want to share their opinions, so listen politely and intently

THANK the meeting participants for their time

- Express that you would like to continue a dialogue on the issue and will remain in touch with future studies and reports
- If the conversation went well, offer yourself as a resource for future questions on this topic
- Send a short thank you email within a week and include any information you promised to share

DO:

- ✓ Prepare for the meeting by gathering info about the policymaker and their background, interests, committee or caucus membership
- ✓ Develop talking points for yourself, anticipate questions, and practice ahead of time
- ✓ Present your information in a direct, organized, understandable, timely manner
- ✓ Offer to provide additional information regarding any questions they may have
- ✓ Take notes during the meeting
- ✓ Be on time and end on time

DO NOT:

- Get discouraged if the policymaker or staffer is late to the meeting; policymaker schedules are unpredictable
- Assume the policymaker or staffer knows about your field of expertise or your issue of interest
- Discuss numerous bills or address unrelated issues
- Treat the meeting as a one-time event; develop a working relationship with the office
- Bring up politics or campaign discussions