**Detailed Tips for Setting up a Meeting with Legislators**

**Pre Meeting Checklist**

* Find influential board members to join you. Use your board to get the meeting if needed.
* Plan to Pre-huddle and post-huddle for a minimum of 5 minutes.
* Decide on all items to go over, with concise ask. Make an informal agenda. Sample below.
* Choose one person to speak for your group, or for each issue.
* Don’t get sidetracked. Come back to your agenda.
* Pay attention to time. Get the legislator talking early.
* Hand off materials *near the end*: Impact Sheet, White Papers, support materials.

**Informal Sample Agenda** (Can parcel out to different people)

1. Thank You, brief indication of ask (1 Minute)
2. Introductions (2 minutes)
3. Background on your local Club (2 minutes)
4. Background on Statewide Scope (2 minutes)
5. Framing of Funding Philosophy: Public government money shifts to private community model (2)
6. Go over key talking points from messaging document: Identify where there is synergy for follow-up on future opportunities.
7. Have a conversation. Listen. Pay attention. Let elected talk. Find their objections.
8. Ask how you can be most helpful in backing him/her up. (2 minutes)
9. Reiterate commitments, decide on time to follow up. Thank for time. (2 minutes)

**In a Meeting -- DO**

1. Thank them, and Identify yourself immediately. Do introductions of others.
2. Be on time. Start out with a shared, common and positive point.
3. Up front, tell the elected what action you'd like taken and why. ***(reference messaging document, customized asks for target legislators, etc)***
4. Establish your own credentials or expertise on the subject.
5. State the impact our program will have, and why to support our position.
6. Be a good listener. Give the decision-maker a chance to express advice and point of view.
7. Use your own words. Never lie or exaggerate. Don't use jargon.
8. Make a direct ask, and let the pause linger. If you don't get an answer, ask again.
9. If they are on your side, ask them for advice and help in reaching other decision-makers
10. Follow up with a thank you, or providing any information requested

**In a meeting - DON’T**
11. Don’t open by handing a piece of paper. Focus on what they have to say, and body communication.
12. Don’t begin with a divisive political issue, election, or highly partisan comment. Instead segue to a common positive point of shared interest.
13. Don't take up all of the time letting each person speak. They are in the room to show their backing, not to each make an individual case. **Let the legislator speak.**
14. Don't get off task, or start talking about other issues not related to your visit.
15. Don’t make notes of a conversation while talking to a legislator.