TIPS FOR PREPARING FOR A FACE-TO-FACE MEETING WITH YOUR MEMBER OF CONGRESS OR THEIR STAFF

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Advocates can leverage face-to-face meetings with members of Congress and their staff to communicate their positions and build enduring relationships with their representatives. However, meetings are brief and members are busy; advocates should keep the tips below in mind to get the most of their meetings.

BEFORE THE MEETING

Prior to meeting with a member of Congress or their staff, do your research and a little bit of preparation to help ensure a successful meeting.

1) **Educate Yourself:** Learn more about the member you're meeting with such as: their district, voting record, committees they serve on, etc.

2) **Have a plan:** Prior to the meeting, have a plan for who in your group will ask the first question, and the order by which bankers will speak during the meeting.

3) **Be on time & flexible:** Arrive no more than 5 minutes before the meeting; Hill offices are too small to accommodate lingering people, and members are rarely available to meet earlier. *Inform the scheduler if you are going to be late in case another meeting time must be arranged.*

DURING THE MEETING

Once in the meeting, remember these tips to help the meeting stay organized:

1) **Stay on topic:** Raise only the issue you scheduled to discuss with the member and/or the member's staff to keep the meeting focused and persuasive.

2) **Urgency:** Provide a one-sentence overview of why this issue is important now (i.e., an upcoming vote or current events).

3) **Personalize your message:** Tell your story and call-to-action in five minutes or less. Include local examples and relevant data that'll help them understand the issue and how it'll affect your ability to serve customers and your community. Be prepared to answer questions.

4) **Keep politics out of it:** Do not discuss elections or campaign support in your meeting. Respect the member's political views and relationships outside of the issue at hand.

5) **Leave behind information:** Leave behind a 1-2-page briefing with data points on the issue discussed with the member's office. *The document should serve as a helpful resource for staff as the issue moves through Congress.*

AFTER THE MEETING

After the meeting, follow up and keep in touch with the member and staff.

1) Send a brief follow-up e-mail thanking your member of Congress and/or staffer for their time. Summarize the meeting and reaffirm how the lawmaker can bring about change.

2) Always offer to be a resource to them in the future.