



How to Lead a Meeting with a House or Senate Office

Please use this document as your guide when meeting with your House or Senate member, or the staffer he/she has assigned to meet with you. In all cases, when meeting with a staff person, part of your "ask" is to ask for a direct face to face with the elected official. Also, always make sure that the documents you hand to the person you are meeting with are external talking points (or, articles relevant to the discussion)—not internal talking points or tip sheets.

About the "Ask": The "Ask" is the specific request that you have for the member. While you come prepared with a lot of information, the most important thing is to ask the member to DO SOMETHING. Examples of "asks" are for a member to cosponsor a piece of legislation, asking a member to vote a particular way on a piece of legislation or a nomination, or asking a member to pledge for future votes. Even in the absence of a member you may ask the staffer, and the staffer will indicate the viewpoints of the member.

Here are some rule-of-thumb points:

- 1) Get there early and meet with your delegation ahead of time.** Find a place for a meeting with your delegation to ensure that your team is prepared for the meeting ahead of time. Remember, everyone should stay on message so remind your colleagues that their own issue, though certainly important, should be discussed at another time. We are there representing Social Security Works, or the coalition that Social Security Works has joined. Do a pre-meeting where everyone understands their roles.
- 2) Get to the meeting location (typically a district office) 15 minutes ahead of the agreed upon time.**
- 3) Everyone has a role, and all members of the group know that.** When each of your delegation members speak they should say what group in the community or city/county they are representing, how many members that organization has, and then articulate the stated ask (e.g. "We are aware that Speaker Ryan has proposed a massive cut to Medicare, we ask you or the representative you work for to vote no").
- 4) When making the ask always be prepared to say how the particular issue will impact people you represent or members of the community** (e.g. "the proposed cut to Medicare will impact the 40,000 older residents of CD 15. They depend on Medicare for their health wellbeing. And, we will make sure they know how their representative voted").
- 5) Take along any relevant state-based, local-based or nationally-based polling.** Our programs, Social Security, Medicare, Medicaid, the ACA, are very, very popular. Use that information.
- 6) If answers and positions are not forthcoming during the meeting, get a certain time when those answers will come.** Such a tactic by an elected official or his or staff is nothing less than a "waffle" but this is not unusual.

7) Make sure to listen carefully. Ask about not just the member's viewpoint, but also if they are looking for anything in particular from the group that may be helpful to them. Of course, you may not be able to commit, but you may also find ways to work together that you didn't expect if you do all the talking.

8) Indicate that local papers, press folks you know, etc., will be informed through letters to the editor and other outreach.

9) As stated, make sure every member of your visiting delegation says the following:

A) Why that organization is taking the position they are taking, what is the impact on the members and the community;

B) How many members the organization has and how you will be reporting back to them; and

C) How your organization has worked with the member in the past (if this is the case), and how you expect to continue that if possible.

10) Give the person you are meeting with the literature that supports your "ask" and get an agreement on when you will be talking again.

11) If you have the ability to create respectable turnout, invite the elected official to a town hall.

12) Make sure to get the contact information for the staffer you meet with. Follow up by email with the staffer to say "thank you" and pass along any additional materials.

13) Be appreciative of the time spent, but clear on the importance of the issue and the need for a response. Emphasize that if the response is not made in the meeting, it should come by a certain date.

13) Let Social Security Works know, via the report form we provide, what happened and what future actions are either planned or participated.