



Five Rules for Policymaker Engagement

If there's an issue you'd like to see addressed in your community, policy is a part of the solution. That means getting in front of policymakers will be part of your task. Policymakers have thousands of constituents vying for their attention—how do you make sure your issue isn't lost in the noise?

One visit won't do it. Educating and engaging policymakers requires an ongoing, intentional effort and strategy.

Here are five key steps that can ensure your effort is successful.

Step 1 Root Engagement in Relationships

Ideally, you'll begin this stage long before you need something specific from a policymaker.

- Think strategically about your organization's priorities and determine which policymakers are most important to engage as potential allies. Also work to determine policymakers that may be opponents with whom it would be beneficial build bridges.
- Begin outreach to their offices by adding them to your mailing lists, sending issue-specific letters, thanking them when they take actions that are favorable to your cause, and introducing yourself to their staff.
- Become a familiar face. You can accomplish this by finding others who have relationships with the policymaker and asking for an introduction, attending events where the policymaker is present, inviting policymakers to your events, publishing letters to the editor praising your policymakers when they've involved themselves in policy that supports your issue, and staying connected with the policymaker on social media.

Step 2

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Step 2 Schedule Meetings and Get Prepared

Once you've started to build a relationship, reach out to request a meeting.

- If there are policy decisions pending that will have an impact on your priorities, explain that to the policymaker's staff and ask for a meeting in their legislative offices during the legislative session.
- If your goal is to provide more background and set the stage for a longer-term view, you'll find policymaker schedules may be more flexible when you are able to meet with them in their home offices during legislative breaks.



Once you've scheduled a meeting, assemble your team and make a plan.

- **Do your homework.** Research basic information about the policymaker. Do they have a personal history with your issue? What's their voting record related to your priorities?
- **Identify who will attend** the meeting, what their role will be, and what they should be prepared discuss?
- **Create or identify a leave-behind.** Leave something with policymakers and staff that provides an overview of your main points and has your contact information. Bring more copies than you think you'll need.

Step 3 Deliver Your Message with Confidence

Although the person you're meeting with may hold considerable power, you are the expert in the room. Remember the following four things to be sure you deliver your message with confidence:

- **You're the expert.** Don't assume the policymaker or their staff have a base level understanding. Begin with the basics. You know more than they do, and you're there to help educate them.
- **Staff is valuable.** It's not unusual for a policymaker to send staff to a meeting in his or her place. Keep in mind that staff members pay close attention and carefully relay your information to their bosses.
- **Remember your key points.** Be succinct, direct and prepared to answer questions. If you don't have an answer to a question, say so, then offer to get back with an answer within a specified timeframe.
- **Remember your manners.** Be sure to introduce everyone in your party at the beginning of the meeting. If a policymaker expresses opposition to your issue, neutralize it as politely as possible rather than engaging in debate. Always be sure to thank the policymaker or staff person for his or her time.

Step 4



Step 4 Continue the Conversation

Begin your follow up activities immediately. Provide follow up information or materials quickly. Send a personal thank you note to everyone from the policymaker's staff that attended the meeting and thank the staffer who arranged the meeting for you. Try to identify three opportunities to make contact in the next few weeks or months to keep you and your issue on the policymaker's radar.



Step 5 Engage Regularly

- Think about your long-term strategy and how you can continue the relationship building you began in Step 1.
- Provide information, updates, and feedback to the policymaker's office regularly, send emails and follow up with phone calls, choose email subject lines that stand out, and craft letters to include key information in a compelling way within the first paragraph.
- Engaging with policymakers often involves a significant commitment of time on your part. You'll find, however, the benefits are well worth the effort.

For more specific tips on meeting with policymakers, see "Key Tips for Meeting With Policymakers" in the ACS Online Toolkit. http://www.advocacyandcommunication.org/wp-content/themes/acs/docs/resources/policy_maker_engagement_December_2015/ACS_Key_Tips_Policymaker_Meeting_Tips_.pdf

View all Tools & Resources here: <http://www.advocacyandcommunication.org/tools-resources/>