

Holding a Successful In-District Meeting

These tips will help you hold successful in-district meetings and build professional relationships with legislators. While this is written for meetings with state legislators, many of these tips can be used to hold meetings with candidates, other policymakers (such as county board or city council members), and other local stakeholders.

One or More Months Prior to the Meeting

- ❑ **Recruit volunteer attendees who are constituents of the legislator.** Contact advocacy partners (ACS, ALA, AHA) as they may also have local volunteers who can attend the meeting. Find several times and dates when volunteer attendees are available.
 - There are times when a volunteer may cancel last minute. Reach out to 1-2 additional volunteers ahead of time to serve as backups if one of your volunteers needs to cancel last minute.
- ❑ **Find an in-district location to propose for a 30-minute meeting** like a coffee shop or public library.
 - If you'd like to do a virtual meeting, make sure you have access to a virtual meeting platform and are comfortable using it.
- ❑ **Schedule the meeting.**
 - ❑ **Call the legislator/candidate's office.** Ask to speak to the scheduler to set an in-district appointment. To find legislator contact information, visit <http://waml.legis.state.wi.us/>. Ask a constituent volunteer to arrange the meeting, if possible.
 - Sometimes calling can be nerve-wracking! You might say something such as:
"Hello, my name is _____ and I am with _____ coalition in _____'s district. We would like to set up a 20-30 minute meeting to discuss (you select the issue-vaping, tobacco use, etc.) in our community."
 - If you would like to do a virtual meeting, ask the scheduler if the legislator or their staff could do a virtual meeting
 - Clarify with the scheduler who should send the meeting invite and which platform will be used or is preferred

1-2 Weeks Prior to the Meeting

- ❑ **Gather background information.** Review legislator's past positions from prior education meetings, candidate forums, newspaper clippings, etc.
- ❑ **Prepare for the meeting.**
 - ❑ **Paint a picture of tobacco's impact on the district.** Reference local data whenever possible. Check the [Local Data Resources](https://tobwis.org/toolkits/educational-advocacy/local-data-resources/) - <https://tobwis.org/toolkits/educational-advocacy/local-data-resources/>
 - ❑ Illustrate local disparities and discuss products in your community. Give examples of products that are being marketed to the community. Are young people attracted to certain products? Are stores selling? Share examples about how tobacco advertising targets specific populations. Talk about where you've seen products displayed. Provide pictures if possible.
- ❑ **Identify tobacco control work being done in the district.**
 - ❑ Prepare to share some of your accomplishments and discuss the innovative partnerships or programs you have developed. Prepare examples of local presentations you have given.
 - ❑ Be prepared to discuss your outreach to populations disproportionately impacted by the burden of tobacco. Prepare examples of collaborations such as:
 - Mental health and AODA facilities.
 - Local First Breath efforts.
 - What youth prevention looks like in your community, highlight work by a local FACT group (if there is one in the district).

- ❑ **Meet ahead of time with the planned volunteer attendees.** Discuss background information with coalition members (i.e. known areas of support or opposing policy positions) and show them the printed leave behinds.
 - ❑ **Come to a consensus about the coalition's meeting goals.** These should reflect the knowledge of the legislator.
 - ❑ **Write an outline of how the meeting may flow.** Use this as a general meeting outline:
 - Introductions
 - Brief Alliance/Network description
 - Current efforts
 - Questions
 - Wrap up (this includes repeating any follow-up items)
 - ❑ **Select the information to include in a leave behind packet:**
 - ❑ **(choose 1-2):** WRAP data, FACT stories, new local ordinances, compliance data, and points of success or significant challenges.
 - ❑ **Always include the statewide Educational Materials four pager.**
 - ❑ **Include local coalition contact information.**
 - ❑ Offer to mail extra copies in case the legislator wants to share them with staff.
 - ❑ **Select roles for the meeting.** Designate a lead spokesperson to facilitate the meeting and keep it on track. Identify specific attendees best suited to address impactful data points, share powerful stories, speak to how program funding is used in the jurisdiction, and answer questions.

1-2 Days Prior to the Meeting

- ❑ **Contact the legislator's office to confirm the time and place.** Don't be surprised or upset if the meeting is canceled at the last minute. Legislative schedules are very fluid and are often "preempted" by pressing issues. Be gracious and work with the staff and volunteers to arrange another meeting.
- ❑ [See here](#) for preparing virtual meetings.
- ❑ **Be prepared that the legislator might bring staff with them or have legislative staff attend in their place.** Communicate with staff just like you would with the legislator. It is important that legislative staff understand the importance of the coalition's work, the successes, and needs of the program.

Day of and During the Meeting

- ❑ **Make sure to give yourself plenty of time for parking, finding the location and arriving to the meeting a few minutes early.**
- ❑ **Be aware that the legislator may run late.** Legislators and their staff often have many back-to-back meetings. If the legislator or staff haven't joined after 10 minutes or so, you can call their scheduler to see if something came up or they are running behind
- ❑ **Prioritize introductions.** Take some time to get to know your legislator (and their staff) and for them to get to know you.
- ❑ **Stay on message.** Stick to the outline you prepared.
- ❑ **Listen carefully to the views, concerns and questions the lawmaker expresses.** Get back to them after the meeting if they have any questions you do not feel confident in answering off the cuff. Keep the meeting positive and focused on public interest. Don't get defensive and don't get into a debate.
- ❑ **Refer to the materials in the leave-behind packet.**
- ❑ **Stick to education and avoid lobbying. Don't ask decision-makers to support or oppose specific legislation.**
- ❑ **It's ok to say "I don't know."** If you don't know an answer to a question, it's ok! Just tell the legislator that you don't know and that you'll follow up with them after the meeting.

Immediately after the Meeting

- Document legislator responses right after the meeting.** Did the legislator provide rationale for why he/she/they supported or opposed an issue discussed?
- Debrief meeting with attendees.** What went well, and what can be improved? Write this down to use for future in-district meetings.
- Send a thank you note and any follow-up items shortly after the meeting.** If more time is needed for specific follow-up materials, send them after a brief thank you note and then send the follow-up materials at a later date.
- Report back to the coalition and state partners on how the meeting went.**

Between Meetings

- Communicate with leaders regularly.
- Invite legislators to appropriate events when they are a target audience.
- Send quarterly newspaper clippings highlighting successes.
- Add them to the coalition newsletter mailing list.
- Attend events in the district to see the lawmaker in-person.