As with any meeting, a successful meeting with an elected official is dependent on preparation and follow-through. Follow these steps to get the most out of these important engagements.

**1. Set Your Agenda**

Elected officials are busy people. If you have taken the time to get on their calendar, they will expect you to have a specific purpose for the meeting. While developing a relationship is an important outcome, it should not be the sole purpose of your meeting. Be clear about what you want to accomplish and state your purpose when scheduling the appointment.

**2. Connect With Your Institution’s Government Relations Office**

Before contacting an elected official about any issue related to your professional role, it is vital that you check in with your institution’s government relations office. To be sure you comply with the requirements of your position, you also should review the faculty/staff handbook. The government relations staff will want to understand the purpose of your planned meeting. They may want you to include talking points on issues important to your institution or ask you to share particular materials at the meeting. They also may have important insights about the official with whom you plan to meet.

**3. Do Your Homework**

It is vital to know what standpoints the official has on issues important to educator preparation. Other things you should determine:

* Is this person an educator? Does he or she have educators in the family?
* Is the official on the education committee or the appropriations committee?
* Has this person either opposed or supported key legislation on educator preparation?
* Has this person visited your campus, or even your program?
* Do you or someone you know have a personal relationship with the elected official?
* Do you know the elected official’s spouse or family member?

Numerous **resources** can help you find important information.

* Members of Congress and many other officials have websites with a wealth of information (biography, committee assignments, press releases, sponsored legislation, etc.).
* You might also consult a respected third- party website that analyzes voting history, campaign donations, or other activity, such as [www.OpenSecrets.org](http://www.opensecrets.org/) or [https://www.govtrack.us](https://www.govtrack.us/)*.*
* Like most professionals, legislative staff are liked to have a profile on LinkedIn.

**4. Gather Materials**

**Business Cards**

If you have business cards, bring a stack of them. You never know how many people you might meet or run into during your visit.

**Leave-Behind Materials**

Prepare printed information to leave with the official after the meeting that provides further information on your organization, program, or priority issues. See AACTE’s guide to creating a one-pager for more information.

**Notebook**

Bring a notebook to record details during the meeting, including what subjects the official wants to discuss, reactions to requests you are making, and any materials you might be asked to send later. You won’t remember everything without writing it down, and chances are there will be a number of people who want to know how the meeting went. Your notes can guide your strategy and next steps.

**Smile and Friendly Demeanor (Put Your Politics Aside)**

Your meeting will be a time to set political affiliations aside, even if you know that the official’s views differ from yours on issues related to educator preparation or any other matter. Remember the purpose of the meeting; you want the official to be well-informed and also to see you as a helpful source for evidence-based information.

**5. Be Ready to Follow Up**

Sending a prompt thank- you note is critical in creating or maintaining an advocacy relationship. To help busy officials and staff recall the specific meeting, plan to mention educator preparation or a few brief points you discussed. You can even take the opportunity to mention any key points you missed during the meeting, and of course, include any additional information that was requested (review those notes!).