



## Tips for a Successful Meeting

Meeting with your legislators is a powerful advocacy opportunity. It can be intimidating, but most people find it is very exhilarating.

Preparation is the key to a successful visit. Please review the following guidelines to help you plan and complete your visit. If at any time you have questions, please contact [advocacy@conqueringchd.org](mailto:advocacy@conqueringchd.org).

### Pre-Meeting Preparation

**Become acquainted with what you will be asking for.** To learn more about our current priorities, review our legislative document, visit our FAQ page for more in depth information, or contact [advocacy@conqueringchd.org](mailto:advocacy@conqueringchd.org). For visits in Washington D.C. be sure to attend our Legislative Conference to meet all your preparation needs.

**Practice telling your story.** Meetings are generally short. With only 2-3 minutes to tell your story, followed by a couple of minutes to share your “ask,” it is important to be brief. Your message should have three key parts:

- 1) Introduction – let your legislators know that you are the constituent
- 2) Your Story – why is CHD important to you? Why is research important?
- 3) The Ask – Make sure you ask your legislator to do something. Support funding, write a letter, join the Caucus are a few of the “asks” you could have.

Tips for telling your story:

- Be clear - use plain words and avoid medical jargon.
- Speak from the heart and talk about your experience.
- Be accurate, honest and persuasive.
- Avoid relying on statistics.
- Be polite, respectful, patient and grateful.
- Practice, practice, practice. Tell your story to others and notice their reactions. After each practice, edit what you liked, and what you didn't like.

**Learn more about your Senators and Representatives.** It is helpful to familiarize yourself with your members' priorities and views by visiting their websites at [www.senate.gov](http://www.senate.gov) or [www.house.gov](http://www.house.gov). By knowing which political party they represent you may be able to better understand their response to your request. Visit our [Legislative Champions](#) page to see if they have already shown support for CHD or joined the Congressional Congenital Heart Caucus.



**Be prepared to meet with your Member's legislative assistant.** Your legislator may not attend the meeting. Staff may be young, but they are instrumental in shaping the legislator's views. It is not unusual for the legislator to defer to his/her staff for an opinion on your issue. It is important to demonstrate respect to everyone you encounter during your visit.

**Bring contact information.** A business card from work, or a 2 x 3.5 inch card you print yourself, should contain your name, address and email information in case follow-up is necessary. Consider creating a [personalized leave behind](#) to make an even bigger impact.

**Plan to dress appropriately.** We ask our advocates to wear clean and appropriate professional attire (suits, dress pants; shirts with ties; dresses; skirts and blouses; etc.) for your meetings with lawmakers. No jeans, sandals, flip flops or printed tee shirts. Comfortable shoes are recommended as there is a significant amount of walking, particularly when in Washington D.C..

**Use your judgment when considering bringing a child.** Children and young adults can be powerful voices and it is important that they learn to advocate for themselves. However, we urge parents to take into consideration that meetings can also be challenging for children. The environment is not conducive to active children demanding good behavior for a long period of time, particularly in Washington D.C. where there may be multiple meetings in several buildings throughout the day. The information discussed is sensitive for some children who do not yet understand the life-long consequences of CHD. We ask that parents be prepared to excuse themselves from any meetings where their child may not be able to cooperate.

### **During Your Meeting**

**Visit as a group.** Whether visiting in-district, or in Washington D.C., as an advocate, there is often comfort in numbers, even if some of the advocates are not direct constituents. It is helpful to assign a leader before the visit who will start and conclude the meeting. You may also identify a note taker who will report back the details of each meeting.

**Introduction:** The constituent story is most important. If you live in the Member's district and can elect him or her into office, you are important. The spokesperson should begin the meeting by identifying himself/herself as a constituent and introducing all participants. Briefly identify your request early in case time runs short.

**Cover the priority issue.** Now is the time you've been waiting for. Tell your story, and explain why NIH funding for research and CDC data collection are important to you. Make your remarks brief and to the point. Encourage them to learn more and do more. Allow others in the room to share their story as time allows.

**Avoid focusing on the medical details** of defects, surgeries, and/or health problems. Your story is more powerful and memorable when you keep it simple focusing on feelings rather than numbers.

**Stay on topic.** Be careful: A little chit-chat is acceptable, but be sure to stay on topic and not be drawn into storytelling—time can pass quickly! Be sure to tie your story back to the priority issue. DO NOT discuss other political issues outside of CHD.



**Establish a connection.** Does the legislator have a personal connection to CHD? Thank them for any past support.

**Deliver your “ask.”** Ask them for their support or to take action regarding the priority issue. If they are agreeable, make sure to thank them appropriately and encourage them to take action as outlined in the material you will leave with them. If there is disagreement, never argue with your legislator or their staff. Listen carefully for their reasoning. Be sure to record their response, either way, to help with our follow-up. Let them know you will contact them again, via email, to follow-up on this request, asking what a reasonable time frame is.

**Leave behind issue pages.** Be sure to leave a copy of the issue materials including your primary contact information or personalized leave behind. PCHA will provide you with printable issue materials for in-district visits on our [website](#). You can also offer to send electronic versions of the issue pages, as well. We would love the opportunity to follow-up and email them.

**Request a Picture.** Be sure to thank them for their time, and request to have your picture taken with your legislator. If a staff camera is used you may be asked to leave your contact information with him/her. You can also snap a shot with your mobile device. Be sure to share with both your legislator and PCHA using social media!

#### **Meeting Follow-Up**

**Complete the online “I Did It” form.** As soon as possible after the meeting, please [complete one report form for each meeting](#). These forms allow us to follow up on the concerns or requests for information and identify potential champions for the issues. We also welcome any additional comments or anecdotes from your meeting.

**Follow-up notes.** Advocacy is all about developing relationships. Keep up the conversation with your lawmaker or staff. We encourage you to send thank you email to their members upon completion of their visit. A simple “thank you for your time” will work; however, including a personal story from the meeting is even better!