Tips for Effective Meetings with Policymakers
About this Document

This guide was created to help scientists get involved in science policy. The document provides an overview of the logistics of how to arrange a meeting with a federal or state elected official, tips for a successful meeting, and advice on how to prepare an effective message.

The Entomological Society of America (ESA) is the largest organization in the world serving the professional and scientific needs of entomologists and individuals in related disciplines. Founded in 1889, ESA has more than 6,500 members affiliated with educational institutions, health agencies, private industry, and government. Members are researchers, teachers, extension service personnel, administrators, marketing representatives, research technicians, consultants, students, pest management professionals and hobbyists.

ESA helps entomologists become effective advocates for their science and to effectively communicate with policymakers. ESA’s public and science policy initiatives focus on raising awareness of the importance of the entomological sciences in policy discussions, educating policymakers, and providing its members with a voice in science policy debates. ESA has partnered with the American Institute of Biological Sciences (AIBS) in order to provide ESA members with an even stronger voice in the nation’s science policy debates.

“Tips for Effective Meetings with Policymakers” was written by Julie Palakovich Carr of AIBS for the exclusive use of ESA.

This document is available at http://www.entsoc.org/PolicyMeetings.
Interacting with Lawmakers

Meeting with an elected official or their staff members is one of the most effective ways to inform public policy deliberations. In person meetings allow you to establish a dialogue and the basis for future interactions with the office.

Why Meet

Meeting with a policymaker helps raise awareness about an issue (e.g. a burdensome regulation), provide input on pending legislation, or advocate for funding (e.g. support for the National Science Foundation).

Where to Meet

There are several opportunities for meeting with policymakers, including:
- Inviting an elected official or their staff to visit a research facility. This can be a particularly effective way to demonstrate how science is conducted.
- Meeting at a lawmaker’s local office.
- Traveling to your state’s capital to meet with state legislators.
- Traveling to Washington, DC to meet with a congressional office.

Who to Meet

In addition to determining where to meet, you need to consider with whom to meet. Speaking with an elected official may not always be possible or appropriate. Sometimes, you might be better served by talking with a staff member. Staff members are influential in making policy decisions, and it is their job to learn about issues and advise the lawmaker.
Contacting Your Elected Officials

A meeting request can be submitted via email or web form. It is advised that you contact the office before submitting your request to find out the preferred delivery method.

Tip: Contact the office before submitting a meeting request to find out the preferred delivery method (e.g. email, web form, phone call).

To find the contact information for your elected officials, visit http://capwiz.com/aibs/dbq/officials/. After you enter your zip code, a list of your elected officials will be displayed. Click on the name of a lawmaker and navigate to the “Contact” tab to find the address of that lawmaker’s office.

Tips for Writing an Effective Meeting Request Letter

• Emphasize that you are a constituent if you live in the district.
• Clearly state the topic of the meeting. Distill your reasons for wanting to meet into one or two sentences in the first paragraph of the letter.
• Avoid jargon. When describing your work, avoid technical terms and acronyms.
• Be succinct. You want to give staff enough information to demonstrate that the meeting will be worth their time, but save details for the actual meeting.
• Clearly state the preferred meeting location, whether at the local district office or at your research facility.
• Include your contact information.

Graduate students visit the U.S. Capitol between meetings with lawmakers.

Photo credit: Julie Palakovich Carr.
October 1, 2013

Subject: Invitation to Desert Field Station

Dear Mr./Ms. [scheduler’s name],

I would like to extend an invitation for the Congresswoman to visit the Desert Field Station, located near Albuquerque, New Mexico. Our staff would like to share information with Representative Brown about the research and education activities conducted at the field station.

Desert Field Station, established in 1941, is dedicated to long-term ecological research, part of the global effort to understand, interpret, and preserve the world’s natural heritage. In addition to scientific research, the field station is used heavily for education, including research training for students from around the world and by visiting college classes, extensive K-12 education, and public outreach.

On behalf of the entire field station, I hope that the Congresswoman will accept our invitation to visit. If her schedule permits, we will be available to meet anytime during the month of October.

If you require additional information or to arrange a meeting, please contact me at (555) 555-5555 or email@university.edu.

Thank you in advance for your consideration of this request.

Sincerely,

[Name]
[Title]
[Affiliation]
October 1, 2013

Subject: Request for a meeting

Dear Mr. Smith,

I am writing to request a meeting regarding federal support for the biological sciences. I am a constituent and professor of biology at the University of New Mexico. As a scientist, I have experienced the impacts that federal investments in science have in generating economic growth, solving problems, and informing public policy decisions. I would like to meet with you to discuss the importance of sustained federal science investments, such as provided by the National Science Foundation. If your schedule permits, I will be available to meet on October 25, 2013.

If you require additional information or to arrange a meeting, please contact me at (555) 555-5555 or email@university.edu.

Thank you in advance for your consideration of this request.

Sincerely,

[Your Name]
[Your Title]
[Your Affiliation]

Follow Up

After you submit your meeting request letter, you will likely have to wait for a response. If a few weeks have passed and you still have not received an acknowledgement of your letter, call the lawmaker’s office.

Legislative offices are busy, chaotic places, so do not be surprised if you are told that they have no record of your request. Letters, especially faxes, get lost. Politely inquire how to resubmit your request in a more effective manner.

You may be offered a meeting with staff instead of the elected official. While this may not be as prestigious, staff are influential in making policy decisions.
Preparing for Your Meeting

Before your meeting, you should do some homework to prepare. At the most basic level, this includes learning about the legislator’s stance on the issue you want to address. Sources of information include the elected official’s website and news articles. For members of Congress, you can see the legislation they have sponsored at http://thomas.loc.gov/.

You should also prepare talking points to help you communicate your message. Begin with your overarching message. What is the most important fact or theme you want the elected official to understand and remember? Next, think about two or three key ideas that you will use to communicate and support your main message. Finally, think about the words and phrases you will use to transition between each of your talking points.

Meeting Guidelines

What to Say

Although each meeting is unique, here is a general outline for what to anticipate.

1. **Introduce yourself.** Provide your name and some information about your organization.
2. **Exchange business cards.**
3. **Thank the person** for meeting with you. Provide a stronger ‘thank you’ if appropriate, for instance for supporting a pro-science piece of legislation.
4. **State your reason for wanting to meet.** This should be the main message of your talking points.
5. **Present your talking points.**
6. **Listen** to the elected official/staff and encourage a dialogue.
7. **Offer to be of service** on this topic in the future.
8. **Thank them again** for meeting with you.
What to Wear

Participants should plan on wearing business attire. For gentlemen, this includes a suit, dress shirt, and tie. For ladies, a dress, suit, or blazer with a skirt or slacks is appropriate. If you are inviting the member of Congress or their staff on a tour of your research facility, business casual attire may be appropriate.

Tips for a Successful Meeting

• Be on time and be prepared to wait. Changes in the legislative calendar and office activity often necessitate lawmakers and their staff deal with other things on short notice.
• Be prepared and succinct. Most meetings are short (less than 30 minutes), so plan on getting to the point quickly.
• Limit the presentation. If coming as a group, select a spokesperson and a common strategy to come across as a cohesive team.
• Stay on message.
• Use a short anecdote or offer facts that illustrate your point.
• Avoid scientific jargon and acronyms.
• Anticipate questions about the policy implications of your research, as well as arguments of opponents of those policies.

Avoid Pitfalls

• Avoid partisanship.
• Do not monopolize the conversation, patronize, or complain.
• If a question is outside your area of expertise, offer to contact an appropriate expert.
• Clarify your opinions versus those of your organization.
• Do not overload with information and papers.
• Do not make unrealistic demands or tell them how to do their job.

Remember: staff are important. They advise the elected official on all aspects of their job, including what legislation to support or oppose.
Send a Thank You Note

Follow up after the meeting with a thank-you letter to the elected official or staff, and offer to be a resource in the future.

Example of a thank you letter to congressional staff.

Dear Mr. Smith,

It was a pleasure meeting with you on October 25th to discuss the importance of federal funding for biological research supported by the National Science Foundation (NSF).

As we discussed, sustaining our economic competitiveness requires a long-term investment in fundamental scientific research and education programs. A robust investment in NSF will help produce the new knowledge and the trained scientists who will drive innovation, create new jobs, and help address the nation’s food security, energy, and environmental challenges.

Thank you again for your time. Please contact me if I can be of assistance to you.

Sincerely,

[Your Name]
[Your Title]
[Your Affiliation]