

# What to Know Before You Go!

## How to Follow-Up

Even if you deliver the perfect message and make a compelling ask, you should be prepared to follow-up on your request. This is especially true when you've attended a lobby day or other type of meeting with an elected official or their staff. There is simply no way that you will be able to relay everything you know about an issue in your initial brief communication. Plus, the officials you're talking to will likely have questions about the issues you raise that you will need to answer. This is why follow-up is so essential.

In fact, in most cases, policymakers won't be able to give you an answer right away on your ask. They may respond in a vaguely positive way, saying something like "that's sounds interesting" or "I'd like to learn more." While it's tempting to think that they are stalling, the truth is much less sinister. In fact, officials often wait to make a decision about the requests that come from constituents for one of three reasons:

- The official simply forgot about the request -- with dozens of requests a day, this happens often
- The elected official hasn't had time to form an opinion on your question
- The elected official is waiting to see how much you really want what you're asking for

All three of these situations can be resolved through effective follow-up. You can remind them about your request, you can gently prod them to make a decision, and you can demonstrate your commitment to the cause!

### *Tips for Effective Follow-Up*

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- Ask again! The number one thing any advocate can do to let an official or staff person know they are serious about the "ask" is to ask again – and keep asking, politely but persistently, until they get an answer

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- Say “Thank You”: Even if you didn’t get exactly what you wanted out of the meeting, it’s appropriate to thank the official or staff person for taking the time to meet with you. Most people are in the office to ask for something or express dissatisfaction – those who take a few minutes to say “thank you” really stand out!
- Use the preferred method of communication: Like all people, policymakers and staff have individual communication styles. Some love to touch base by phone, others prefer e-mail. Some like to take five minutes to meet face-to-face. Most staff will really appreciate it (and think positively about you and your efforts) if you ask them whether it’s best to update them via phone, e-mail, or in a meeting.
- Become an ongoing resource: Because they must, by necessity, be generalists, most policymakers and their staff usually are not experts on all issues. Therefore, they are always turning to trusted outside experts when legislation that impacts their constituents is on the table. Let the staff know if you have done research on specific areas of your issues. Knowing that there’s someone in the district who really understands the needs of those groups can be very helpful, because they’ll know who to call to get the details they need to make an informed decision.
- Social Media: Long considered a tool of members of the youngish crowd to communicate with others of the youngish crowd in their incomprehensible language, social networks can play an important role in connecting advocates with policymakers in a meaningful way. The three most used sites on Capitol Hill (as of this writing) are YouTube, Facebook and Twitter. Be sure to post videos from your meetings and comment (positively!) on your legislators' Facebook pages. Include your organization's hashtag on your posts, as well as legislators' twitter handles. And, of course, share and retweet any mentions of your meetings.

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### *Three Follow-Up Techniques That Work*

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While there are certainly many ways to build long term relationships with policymakers, three key techniques stand out as truly effective means to ensure that officials and their staff stay connected to and up-to-date on your issues. These three important follow-up techniques are:

- Site Visits
- District Meetings
- Attending or Coordinating Townhall Meetings

#### **Site Visits**

A “site visit” is an in-person visit by a policymaker or staff to a facility, office or location in the district or state. These visits are invaluable to helping officials understand the impact of proposed policies on individuals and businesses in their district. It can also be effective to ask a staff person to do a visit before you ask his or her boss. That way, assuming you make the visit as interesting as possible, you can turn the staff person into an advocate for future visits. Officials sometimes make decisions about where they might spend their time based on a positive experience their staff person may have had. In addition, the staff are very influential in terms of the policy decisions made in the office – getting them up to speed is always a good idea.

#### **District Meetings**

Believe it or not, you can be an effective advocate from the safety of your community! Your legislators and their staff are generally home at least once a month to meet directly with their constituents. These are called "District Work Periods," and you

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can find the schedules at [House.gov](http://House.gov) and [Senate.gov](http://Senate.gov). Note that they change every year. The longest work periods are usually around national holidays, as well as, often, the entire month of August. Meeting with your elected officials at home helps you reinforce the message that you care about your issue -- and that you're not going away. The best way to set something up is to simply call the local office and ask! You will likely be directed to a scheduler (sometimes this person is based in DC) and will be asked to send a written (e-mailed) request. As with the DC meetings, don't be insulted if you're asked to meet with staff. In fact, getting to know local staff people is as important as connecting with the policy staff in DC.

### Attending a Townhall Meeting

One of the most effective ways to gain the attention of policymakers and their staff is to attend a townhall or community meeting. Officials arrange these meetings to hear from people in their districts and states. They generally occur during district work periods or when the legislature is out of session. You can find out the schedule for your own officials by calling their office or checking their website. Many officials send notices to any constituents on their e-mail lists as well.