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EDUCATING POLICYMAKERS: A GUIDE TO LEGISLATIVE VISITS

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Introduction

Reaching out to legislators serves many purposes. It helps your elected representative more clearly understand the concerns of your organization and the population it serves. If you are an individual or a family member it allows you to explain how a proposed new law or regulation would impact you personally. If you run an agency or a program, it allows you to demonstrate the social contributions of your program, and it can provide an opportunity to showcase the services you provide and the people you employ and serve.

There are two main methods for having fact-to-face meetings with legislators. One is a **legislative visit**, where you visit the legislator's office for a meeting. The other is a **site visit**, where you invite the legislator and his/her staff to attend a community event, or to tour your program. Regardless of the form the visit takes, it is part of building an ongoing relationship with your elected representatives.

The following information is meant to serve as a guide to assist you in scheduling, planning, and conducting a legislative visit. Great emphasis is placed in preparing and delivering a cohesive and clear message. The steps outlined here are suggestions for setting the stage for a successful visit with your legislators.

Step 1: Set up the meeting

Determine who to contact. The Utah Legislature is comprised of 75 House districts and 29 Senate districts. You can determine your legislators by visiting the Utah Legislature's website at <https://le.utah.gov/GIS/findDistrict.jsp> and entering your address and zip code.

You will be directed to all the names and contact information for the state legislators in your district. Call your legislators nearest local office. While in session, legislators are usually at their Capitol office. It's usually more convenient for you to visit the legislator's district office nearest you, but if you prefer, you can visit their Capitol office during the session.

When you call your legislator's office:

1. Identify yourself and briefly introduce yourself as a constituent and voter.
2. Explain why you want to visit and ask to set up a time to come in to speak with the legislator either in the district or Capitol office.
3. If the legislator is unavailable, meeting with staff members is also a great opportunity as they play important roles in shaping priorities. More than likely, you will meet with the staff person who covers health and/or education issues.
4. If meeting with the Senator or Representative, you may be asked to send a written request for the visit. Send a written request, if necessary.

Many offices will request a letter. The letter needs to include who will be part of the visit – names and affiliations – and a short description of why you want to meet with the legislator. If

possible, it's a good idea to personalize the issue you wish to meet about through a compelling personal story. Always refer to your legislator as "The Honorable (Name)" in addressing the envelope and the letter. In the salutation, write: "Dear Senator," "Dear Congressman," "Dear Congresswoman," or "Dear Representative" so your message doesn't look like junk mail.

Step 2: Get Ready

The most important thing to do is to prepare your message. All planning for a legislative visit must be firmly rooted in a clear and concise message. Clearly identify a problem and purpose for visiting. It could simply be a meeting to get to know one another. You don't have to wait until there is a pressing issue, and a visit doesn't have to be just about lobbying. Often the most valuable visits are those where you educate and inform policymakers on how specific programs or policies are working for you.

It is critical to develop a uniform message, so your legislator walks away with a greater understanding of the impact of a proposed policy on you and your family. Your message should define your issue; explain why it is important to you; and describe how policymakers can help. Your message should include specific examples of how a specific issue our policy impacts you and your family through personal stories and experiences.

Materials. Prepare a one-page fact sheet about your specific issue, highlighting the message you want the legislator to understand. This fact sheet should be concise, but clear about your issue and its impact on you and your family. Although not necessary, you may also wish to bring additional supporting information like position papers, editorials, and/or fact sheets about the particular legislation/issue you are advocating for. You should also remember to give you legislator your business card, or a contact sheet, so they can follow up with you if they have additional questions after your visit.

Strategize Cooperatively. If you are visiting with a group, you should take the time before the visit to formulate a strategy with everyone attending the meeting. You want to appear professional and coordinated in your messaging, so you should:

- Decide who will make what points.
- Have facts lined up prior to the meeting.
- Keep focused on the issue you requested to meet about.
- Be prepared for questions, and think through possible solutions.

Step 3: During the Visit

Be punctual and friendly. Legislators and staff are just as busy as you, so be sure to arrive on time for your visit. Greet the legislator and/or staff representative with a firm handshake and thank them for their time. Introduce yourself by giving your name and allow other members of your group to introduce themselves. Hand your business card to each of the people with whom you are meeting.

Deliver your message. All written materials and participants must be prepared in advance to “be on message” with the central theme of the day to ensure the focus stays where it is most needed. Stay positive and suggest solutions. Encourage your legislator to work with people in your community and/or your organization to find a solution.

Ask for a commitment. Ask the legislator directly about his or her willingness to support your issue or request. Identify points for follow-up and invite the legislator and staff to contact you if they have additional questions, or if they need additional information.

What happens when issues are raised that you did not expect? Answer directly if you know the topic and can speak to the issues. If you don’t know, it’s OK to tell them so and offer to get back to them with the information.

Tips for communicating with the legislator:

- **Know your legislator.** Review his/her biography. Learn their party affiliation, committee and subcommittee membership and past record on the issue you will be discussing. Knowing these facts will help guide your discussion and demonstrate that you have adequately prepared for the visit.
- **Remember: You’re the expert!** Legislators and staff usually know little or nothing about your day-to-day experience and the impact of specific policies on the lives of their constituents. Be sure to explain all acronyms, programs, funding sources and which agencies administer the funds.
- **Be Political: Put a community face on the issue.** Legislators want to represent the best interests of their district or state. Wherever possible, demonstrate the connection between what you are requesting and the interests of the legislator’s constituency.

Step 4: Follow-up

Immediately after the visit. Follow up with a thank you letter outlining the points covered during the meeting and include any additional information that was requested.

On-going efforts. Send reports and newspaper articles relevant to your issue in Utah and elsewhere to your legislator. Ask others – friends, family members, school personnel, community members, religious and business leaders, and neighbors – to write letters to the legislator that support your position.

A legislative visit should not be a one-time event. The more often you visit legislators, the more comfortable you will get with the process. The most important element in visits with legislators is establishing a personal connection that will continue in the future. In order to maximize effectiveness, you should have a plan that fits into a more extensive advocacy agenda. When your legislator is called upon to show leadership for disability related issues, he/she may draw upon their knowledge and impressions gleaned during their visit with you and other advocates.

Other Tips to Contact Legislators

The best way to develop relationships with elected officials is to call, write and visit with them regularly. It's recommended you start with your elected lawmaker, before moving on to others.

You can call, text or email. Email is the preferred method of communication during the 45-day session, but you can also text legislators during the session, and you can find many legislators' contact information on their legislative contact page here:

- 2022 Utah House Members: <http://house.utah.gov/house-members/>
- 2022 Utah Senate Roster: <https://senate.utah.gov/senate-roster/>

Don't forget to let your legislator know that you live in their district by including your contact info in your email or text. It sometimes takes a bit to hear back, especially during the session, but constituent communications are prioritized above others.

Make sure that you keep the communication simple. Many seasoned advocates warn against long-winded emails to rant at a lawmaker about a particular bill or issue. Using bots, forwarding mass emails, or copy/pasting boilerplate emails to lawmakers is also considered largely ineffective.

If you want to speak to your legislator while they are in session at the Capitol you will need to know where they are. For a schedule of the session, go to <https://le.utah.gov/> and click on the "Calendar" link in the bottom center of the page.

Finally, don't just limit your contact to your lawmaker during the 45-day legislative session; some of the best policy work is done outside the legislative craziness in January and February!