

# Pre-Meeting Checklist

## MEETING WITH OFFICIALS IN PERSON



Meeting with officials (or their staff) **in person** is a critical part of your campaign. This is your chance to impress the official with your campaign's community strength and political savvy and to persuade the official of the need for your proposed ordinance. Therefore these meetings must be planned strategically and carefully. Below is a checklist to help you prepare and coordinate the logistics of this type of meeting.

### 1. RESEARCH THE ELECTED OFFICIAL

- Figure out what groups and individuals have influence with him/her
- Determine what messages will appeal to him/her
- Get copies of the statements listing his/her contributors from the city clerks office

### 2. DETERMINE WHO WILL ATTEND THE MEETING

- Select people to attend based on who fits the strategy for this official
- Make sure you have someone in your group who can lobby
- Only invite people you know. No wild cards.

### 3. SET UP THE MEETING

- Call the official's office to set up the meeting
- Later, send an e-mail to the office to confirm the meeting

### 4. DECIDE THE MESSAGE FOCUS

- Determine what will appeal to this official and which messages to use
- Decide what you are asking the official to do (Support? Vote? Champion?)
- Decide what your fallback request will be

### 5. DECIDE WHAT MATERIALS TO BRING

- Determine who will develop specific materials (for example, who will breakdown surveys results by district)
- Determine who will bring the materials and put them in a folder
- Based on your research, predict as best you can what information the official will want and bring that

### 6. DECIDE WHAT PART OF THE MESSAGE EACH PERSON WILL DELIVER

- Write talking points for each person and deliver them well before the meeting
- Rehearse talking points with them days before the meeting either over the phone or in person

### 7. CALL PEOPLE THE DAY BEFORE TO REMIND THEM OF THE MEETING

- Make sure they can still attend
- Remind them where you will be meeting and when (provide directions and parking information)
- Exchange cell phone numbers for last minute needs
- Reconfirm your appointment with the office of the official

### 8. MEET AN HOUR BEFORE THE MEETING AT A NEARBY COFFEE SHOP

- Walk through how the meeting will go
- Talk about the message and goals
- Walk over to the meeting together

### 9. THINK ABOUT WHAT TO SAY DURING THE CHATTER BEFORE THE MEETING STARTS

- If anyone in the meeting will know the council member personally prepare that person to engage in a short personal exchange with the official
- For others, think about what you know about the elected official that you might talk about if the situation arises (for example, figure out if the official has been in the news lately)

### POST-MEETING:

- Follow up afterwards with the official to thank them and provide any information you promised
- Thank your coalition members