

Scheduling a Legislative office visit in the District

1. **Call your State Representative's or Senator's district office** and ask for his/her scheduler. Be prepared to give your name, home address and phone number, as well as the date/date range you'd like to meet. When asked about the purpose of the visit, let them know that you are a constituent and a member of the Texas PTA and would like to discuss issues of interest to the schoolchildren of Texas.
2. **After scheduling your meeting**, make sure you get the location, address and directions (if needed) for your meeting and arrive promptly. Be sure to provide the legislator with a folder with information on your local or council PTA and with the TX PTA's legislation position flyer. You will probably only have about 20 minutes, so follow the meeting format to the best of your ability. It will help you stay on track.
3. **After your meeting, please complete the legislative visit report form** provided in your folder and return it to the state PTA office. Your prompt feedback is very important in helping us coordinate effective legislative strategy. In addition, you are asked to write the legislator a thank you note, regardless of the success of the meeting.

Tips for a Successful Lobbying Meeting

- Be on time or a few minutes early- but be prepared to wait. Determine the office location prior to the visit.
- Be prepared to meet with the legislator or the aide. If the legislator is not available, make your presentation to the staff member as though you would with the legislator. Aides, especially senior staff, have a great deal of responsibility because they do research on issues. They are often able to influence the legislator's positions, priorities and, ultimately, votes. Be sure to get the names, titles and areas of responsibility of all the staff members with whom you meet.
- If the legislator has a connection to the organization, it should be noted in opening remarks by the delegation leader and the legislator should be thanked for any support of previous issues.
- The pre-determined delegation leader should make sure that introductions have been made, and then begin the meeting by thanking the legislator or aide for their time and past support, if applicable. Then the leader should state the purpose of the meeting, describe TX PTA, and make sure legislators know of any constituents among the delegation.

- In order to engage each of the participants, a different person in the delegation should handle each issue. Move on to the next topic once it is clear that there is agreement and understanding, or a failure to attain agreement during this meeting. (You will be provided with a list of TX PTA priorities prior to your meetings.)
- Keep the discussion to a total of 15 minutes. The only exception would be if the lawmaker initiates a longer conversation. Be clear, concise, and to the point. Be a good listener and observer and do not over-explain. It is acceptable to refer to notes. Allow the legislator or aide to ask questions, offer their viewpoint and voting record.
- Be specific about the action that you would like them to take. When applicable ask for the vote. Get a commitment from the legislator or aide if you can.
- If the legislator is “on board” with our issues, solicit his/her suggestions as to actions the organization may take to advance issues of mutual concern.
- Stick to the agenda, and remember that you are representing the views of the entire organization. No personal business should be discussed during these meetings.
- If you cannot answer a question, commit to finding the answer and contact the state office of TX PTA for assistance.
- Avoid argument. Just state the positions as TX PTA believes them to be. You may have to agree to disagree. Always be cordial and courteous - **no exceptions**. We are there to provide a viewpoint from their constituency and to begin to establish a relationship with the legislator.
- The delegation leader should wrap up the meeting with sincere thanks for their time, restatement of the legislator’s position, and an offer to be of assistance. When applicable, the delegation leader should present position papers at this time.
- Follow up with a personal thank-you note when you return home.
- Please fill out the Legislative Visit Report and return it to the state PTA office.