

# Conducting Meetings with a Decisionmaker

Being an effective child advocate requires building strong relationships with decisionmakers and their staff. Decisionmakers exist at all levels of government and school administration and can be elected or appointed to their roles. At the federal and state level, a decisionmaker can be a legislator or their staff, or a state or federal education agency staff member. At the local level, decisionmakers can be school administrators or leaders such as school board members, superintendents, principals or teachers.

It is important to take every opportunity to reach out to build and maintain your relationship with decisionmakers. Meeting with a decisionmaker and letting them know what policies are important to you, your school and your community is an important step in building a positive, productive relationship.

You should note that decisionmakers at all levels will likely assign staff to participate in meetings, as staff are usually the team members directly involved in developing and/or implementing the policy or policies important to you. Most congressional meetings are taken by one of their staff members, who then relay pertinent information onto the members of Congress. Use the following tips to help you schedule and meet with decisionmakers.

## Before Your Visit

### Scheduling

You can schedule individual or group visits with decisionmakers. You can meet with your members of Congress either in their Washington, DC office or their district office (i.e., the decisionmaker's office in your state). Most decisionmakers want to meet with people who live in the area they represent—at the federal level, this means most elected officials will not meet with constituents from other states or districts, so it's a good policy to only schedule meetings with your own member of Congress. To find your federal representatives' contact information, please visit the PTA Take Action Center at [PTA.org/TakesAction](https://www.pta.org/TakesAction).

At the state level, you can meet with your legislators in-district or in their office at the state capitol. To schedule a visit, you should consult your state legislature's website to find contact information for your members' offices.

At the local level, you can ask for a meeting with a superintendent, principal or member of the school board or invite them to attend a PTA meeting. You may need to call the school, school district, or school board offices and/or check their websites to find contact information to request an appointment.

### Note:

If you are a State PTA President or President-Elect, a Federal Legislative Chair or are otherwise representing your entire state PTA, as a representative of a statewide organization you will have an easier time scheduling a meeting even if you do not live in the district the decisionmaker represents. However, your visit will have more of an impact if you include at least one member of a PTA located in the district in the meeting. Additionally, at the federal level, the online meeting request forms located on many members' websites may automatically flag you as "out of district." Therefore, it is important that you initiate these meeting requests over the phone or through a direct email with the scheduler.

When you call to schedule a meeting with a decisionmaker there are a few things to know.

At the federal level, you can call your member of Congress' Washington, DC office or their district office. If you are calling the district office, you should ask the scheduler to set up the meeting with the member of Congress while they are in the district. If you are calling the Washington, DC office to set up a meeting on Capitol Hill, you can either ask for the scheduler (if you are requesting a meeting with the member of Congress), or you can ask to be transferred to the Legislative Aide handling the issue you wish to discuss if you'd like to meet with them instead. Try to request a meeting between 8:30 a.m. and 5 p.m.

The process at the state level is like the federal level in that state representatives will likely have an office and some staff at the state capital and a local office. Check out your state legislature's website for the contact information of your state representatives. If your legislature is in session, you should ask to meet with the member or their staff member. If your state legislature is not in session, you may be able to meet directly with the member at their local office or in the

At the local level, decisionmakers may not have an office or staff to arrange a meeting. If they do have an office, try calling there to schedule a meeting. If you can't find contact information for an office, a phone call or an email directly to the decisionmaker you are trying to meet with may be the quickest way to schedule a meeting.

Whenever you call to schedule a meeting with a decisionmaker, make sure to identify who you are, who you represent and who will attend the meeting. Indicate what you want to discuss with the decisionmaker or their staff. It is also extremely helpful to provide background materials in advance of your meeting. Note that some offices will respond more quickly than others. The day before the appointment, make sure to call to confirm your meeting.

## Scheduling an Appointment with a Decisionmaker

- Identify yourself and what organization you represent
- Ask for a scheduler, legislative aid or the person who answered the phone to schedule a meeting
- Request a time between 8:30 am and 5 p.m.
- Indicate the topics of discussion for your visit

### Do Your Research

Before your meeting, make sure to learn about the decisionmaker you are meeting with, including any positions they've taken. If your decisionmaker is an elected official, find out what committees they serve on and how they voted on issues of importance to you. A simple internet search can provide you with information on your elected official's position, priorities and voting record. Bring local statistics and facts about your state or local PTA's influence on the issue that you will be discussing during your meeting.

If you are meeting with a decisionmaker at the federal level, you should become familiar with National PTA's public policy priorities, which can be found in the PTA Public Policy Agenda at [PTA.org/Advocacy](https://www.pta.org/Advocacy). The PTA Public Policy Agenda includes research, statistics and rationale supporting its recommendations. Additionally, we encourage you to contact the National PTA Government Affairs staff to assist in providing you with any pertinent information prior to your meeting.

If you are meeting with a decisionmaker at the state level, check with your state PTA to see if they have any relevant position statements or if they support any state legislation relevant to your issue. Reaching out to your state PTA or council/region for guidance can also be helpful at the local level, as well as researching any information on local issues of importance to your school or community.

## During Your Visit

### Arrive Early

It is always a good idea to arrive five minutes early for a meeting with a decisionmaker, and if you happen to be running late, please call the office and let them know. Be patient if the decisionmaker is running late as their schedules are often packed tight.

At the federal or state level, a meeting in the capitol when the legislature is in-session may be cut short for a vote, or a staff member may take over the meeting if the decisionmaker gets called away. If this occurs, continue your meeting with staff and leave behind information about your local programs and National PTA's Public Policy Agenda.

An in-district meeting with a federal or state-level decisionmaker, or a meeting with a decisionmaker at the local level is less likely to be interrupted, but please be patient if something comes up during your meeting.

### State the Purpose of Your Visit

After the initial handshakes and introductions, state that you are a member of PTA, share some demographic information (your state, local PTA name and school), what you want to talk about and why. When advocating for a specific bill at the federal or state level, you should know the title, number and status of the bill. In a direct and polite manner, request the action you would like to be taken on the bill. Remember to be brief and to the point.

At the local level, your meeting might be about a district policy or school board proposal—but the principle remains the same, be prepared with information and make a clear ask for the decisionmaker. Your visit should last about 20 to 30 minutes.

### Make It Local

All politics are local. In any meeting with a decisionmaker, be sure to connect the issues you are discussing to what's happening and the real-world impact in your state, district and/or school. Provide local statistics, facts and stories to illustrate your point. Explain how your community and the policymaker's constituents are affected and how PTA would like them to address the issue.

### Listen, Respond and Don't Argue

Listen carefully to what the decisionmaker or their staffer has to say and allow them to state their opinion and position on the issue. If the decisionmaker does not agree with your position, don't argue or make a future enemy. Simply identify issues of concern or differences

of opinion and respond based on your knowledge and experience. Remember you are trying to build a relationship, so don't alienate someone who may be a future supporter.

If you don't know the answer to a question, just say so and promise to get back to them with an answer. At the federal level, National PTA's Office of Government Affairs can offer support, if needed. At the state level, your state PTA should be able to provide support. At the local level, reach out to your council, district or regional PTA leadership.

### Wrap Up the Meeting

Summarize your key points and positions. Provide and leave behind information that supports your position, fact sheets about the issue and your contact information. Thank the decisionmaker for their time and leave promptly.

### After Your Visit

#### Follow Up

Be sure to send a thank-you email to whomever you met with. Remember that you want to develop and maintain a relationship with the decisionmaker and any relevant staff—so stay in contact, send periodic information and updates, invite them to visit your school or program, and pay attention to any statements or votes they make on issues that are important to you.

### Keep National PTA Informed

If your meeting was with a member of Congress or their staff, let National PTA know how your visit went and where your member of Congress stood on the issues you discussed. You can do this by submitting a PTA Advocacy Feedback Form at [PTA.org/TakesAction](https://www.pta.org/TakesAction) under "Surveys."

This gives National PTA staff in Washington, D.C. additional insight into the positions of members of Congress and helps us identify strong supporters and those that need additional attention or information, as well as PTA members who have good relationships that can be called upon in the future.

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The logo consists of the word "National" in a blue, sans-serif font above the word "PTA" in a large, bold, blue, stylized font.

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