Meeting Effectively   
with Elected Officials





The United Church of Canada  
L’Église Unie du Canada

justice@united-church.ca

Contents

[Why Is It Helpful and Important to Meet with Elected Officials? 3](#_Toc100231915)

[How to Schedule a Meeting 3](#_Toc100231916)

[Once the Meeting Is Scheduled, Do Your Homework 3](#_Toc100231917)

[During the Meeting 4](#_Toc100231918)

[After the Meeting 5](#_Toc100231919)

[Additional Resources 6](#_Toc100231920)

[Appendix 1: Suggested Meeting Agenda and Process 6](#_Toc100231921)

[Appendix 2: Notes Taking Template 7](#_Toc100231922)

[Appendix 3: Getting to Know Your Member of Parliament 10](#_Toc100231923)

[Identifying and Locating Your Member of Parliament 10](#_Toc100231924)

[Understanding the Role of House of Commons Staff 10](#_Toc100231925)

[Making a Telephone Call 11](#_Toc100231926)

# Why Is It Helpful and Important to Meet with Elected Officials?

* Relationship building
* Asking them to take action
* Educating them on an issue important to you
* Building solidarity with them on an issue you share in common

# How to Schedule a Meeting

* Local officials may be met in the town/city hall, or in some cases they may have local offices.
* When meeting with provincial officials you will most likely meet them in their local constituency office, but sometimes it may be better to meet government ministers at their legislative offices.
* Meeting with a federal member of parliament may take place in the MP’s Ottawa office or in the MP’s riding office. If you know your MP is going to be home for a Parliamentary recess, take advantage of this time by planning a meeting in the riding. It is usually much easier to schedule a personal appointment with an MP (even one who is a Cabinet Minister) in her or his constituency office rather than in their Ottawa office. Virtually all MPs have regular constituency office appointment hours.
* Recently many officials and representatives are also available to meet online.
* Contact your official’s office, state your affiliations and the subject you wish to discuss, and ask for 15 to 20 minutes of your elected official’s time. If it is clear that the elected official is unable to meet with you, then a very good substitute is a meeting with the assistant in charge of the issue area you are interested in discussing. Do not feel discouraged if you cannot meet with your elected official. In fact, public officials have demanding schedules and depend on their assistants to research issues and report on constituent concerns.
* Call to confirm your meeting a few days before it is scheduled to occur. Build relationships—seeking, meeting, and following up from a meeting with an elected official is part of a process of building a relationship with that official and their staff. This is essential to long-term advocacy.

## Once the Meeting Is Scheduled, Do Your Homework

* Learn as much as you can about the elected official’s record as it relates to your issue.
* Learn about what issues and concerns are priority for the official, and be creative about thinking about how your request could help them move their own priorities forward.
* Be prepared to talk in detail and directly about the issue you wish to discuss.
* Know the opposing arguments, as well as those in favour of your view.
* Have your information ready in a digestible, concise form, just as you would when writing a letter or making a telephone call.
* Have personal stories ready—case studies that illustrate the human side of what you’re talking about. Be able to answer specific questions on how the issue affects you, your community, the province, or the country in general.
* Contact organizations working on your issue. They may be able to help you find out about the elected official’s record on the issue—public statements, legislation, etc. It’s much better to know if the legislator doesn’t support your position before you go in than to find out during the meeting.
* Supply fact sheets (for example, one-page synopsis describing the issue in bullet form). It’s important to leave something with the assistant or the MP.

## During the Meeting

* **Be on time.** But don’t be surprised if they are not. Parliamentary schedules are hectic and being a visitor to Parliament Hill often requires patience and flexibility, as does meeting with any elected official.
* **Establish ties.** Introduce yourself, convey information about your affiliations, and exchange pleasantries briefly. Make a point of introducing yourself to and learning the names of key staff with whom you may also meet.
* **Be focused.** Get right to the issue you wish to discuss. Don’t get bogged down in small talk or raise more than one issue. You only have a precious few minutes with the elected official.
* **Be inquiring.** Ask your elected official if he or she is familiar with your issue. If not, take the opportunity to inform him or her.
* **Be assertive and concrete.** Know what you want in advance and ask for it. Ask your elected official whether they would be willing to take concrete action, no matter how small.
* **Be respectful.** Be tolerant of differing views and keep the dialogue open. State your points clearly and firmly, but don’t argue. Always be polite, but don’t let politeness make you timid.
* **Be responsive.** Try to answer questions. When you can’t, offer to get back to your elected official with the information. It is much more important for you to provide accurate information than to give an answer which may be incorrect.
* **Be appreciative.** Always end the meeting on a courteous note. Thank them for the time spent with you and leave promptly. Follow up with a thank-you letter within two weeks, capitalizing on the opportunity to restate your points.
* **Be political**. Explain the hometown relevance of this issue. Ask others in your riding to meet with your elected official on the same issue.
* **Be discriminating.** Meet only on the issues that are very important to you and avoid the risk of diluting your effectiveness.

As part of your preparation, you may want to do a walk- or talk-through, a role-play that gets you comfortable before your meeting. Elected officials are people too, but sometimes the trappings of an elected office can be intimidating, so preparation that makes you feel comfortable and confident is important.

After the Meeting

Compile notes from the meeting to give yourself a record of what was discussed. Take particular note of what the elected official and/or you and your group committed to doing, and be sure to follow up. If relevant, share outcomes with organizations you are working with. A template for note taking is included in Appendix 2.

*\*Above text adapted from* [*https://cpa.ca/documents/advocacy\_p5.htm*](https://cpa.ca/documents/advocacy_p5.htm)

# Additional Resources

## Appendix 1: Suggested Meeting Agenda and Process

**Introduce yourselves:** Starting with group leader, introduce yourselves and exchange contact information. Explain who you are and relevant faith and professional affiliations. **(Group Leader starts)**.

**Thank you:** Thank the office for making time to meet with you and for a position the Member has taken that you support. If no constituent is present, but someone has met with them or contacted them recently on this issue, mention it now. **(Constituent\*)**

**Introduce why you are there and the request. (Group Leader)**

**Tell your stories: Explain why you care about this issue. (Group Members)**

**Make the request. (Constituent)**. Have a clear, concise request.

**Listen and respond to Member/staffer’s questions. Ask any follow up questions.**

**Leave behind any relevant materials and contact information.** Repeat request. **(Group Member)**

**Thank the Member/staffer.** Make sure you have the card of the staffer you met with. **(Group Leader)**

**Send a Thank You.**

**Share your findings with others working on this issue.**

In advance, determine who will carry out what role in the above agenda.

* Introduction
* Time keeper
* Note taker
* Questions
* Request
* Follow up material

*\*Adapted from KAIROS Canada* [*resources*](http://C://Users/ch711251/OneDrive%20-%20The%20United%20Church%20of%20Canada/Election%20Stuff/F%20&%20P%20page%20post%20election/How-to-Take-Great-Notes-in-a-Lobby-Meeting.pdf) *by The United Church of Canada, 2022*

\*Constituent: someone who lives in the geographic area that the elected official represents.

## Appendix 2: Notes Taking Template

|  |  |
| --- | --- |
| Date: |  |
| Time: |  |
| Name of Elected Official(s) |  |
| Delegation Member(s) |  |
| Topic/Issues Discussed |  |

|  |  |
| --- | --- |
| Concerns/questions raised by the official or staff | How did we address/answer the concerns? List responses here. |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

**What were the positive messages/take-aways from this meeting? What is being done? What can we build on?** (e.g., key roles/perspectives/interests/relationships/resources/networks of the official that can *help* towards realizing our request; points to include in thank you letter)

|  |
| --- |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

**What were the negative messages from this meeting? What do we need to work/focus on?** (e.g., key roles/perspectives/interests/relationships/networks of the official that may *hinder* a positive response to our request; lack of receptivity)

|  |
| --- |
|  |
|  |
|  |
|  |
|  |
|  |
|  |

**What was surprising/new in the discussion?**

|  |
| --- |
|  |
|  |
|  |
|  |
|  |
|  |

**What commitment did your representative make?**

|  |
| --- |
|  |
|  |
|  |
|  |
|  |

**Plans for follow-up, resources we can provide, connections to be made/developed**

|  |
| --- |
|  |
|  |
|  |
|  |
|  |

## Appendix 3: Getting to Know Your Member of Parliament

### Identifying and Locating Your Member of Parliament

The first step in effective communication with the House of Commons is determining the right person to contact. It is generally most effective to contact your own Member of Parliament—the person who represents your electoral riding. As your elected official, this is the person who represents you and who must be sensitive to your views. Members of Parliament (MPs) maintain both an Ottawa office and a local office. You can identify and locate your MP on the [House of Commons website](http://www.ourcommons.ca/Parliamentarians/en/members).

There may be occasions when it will be appropriate and helpful to contact other MPs. For example, when you have expertise in a specific area in which a Parliamentary Committee is developing policy, your communication with them can be important.

### Understanding the Role of House of Commons Staff

The bureaucracy carries on the business of government. These government officials remain when political parties are voted in and out of office. Bureaucrats are very influential in the development and implementation of laws and public policy. Effective relations with the civil service are very important.

Whether calling, writing, or visiting a House of Commons office, it is important to understand the role of your MP’s staff members. Most MP’s offices will have an assistant handling your area of interest. Each Parliamentarian relies heavily on his or her staff to be knowledgeable and informed on the issues. Because the information and advice they provide is often critical in shaping the MP’s opinion on an issue, any time spent discussing your views with them will be a good investment.

#### Committee Staff Members

In addition to the staff members in the MP’s personal office, the committees of Parliament also have professional staff members. These staff members are often more focused in their responsibilities. While a personal staff member usually has multiple subject areas of responsibility (e.g., covering science, budget, environmental, and health issues), a committee staff member is often able to specialize in a small number of areas and to acquire expertise in them. These staff members work for the MP who chairs the committee, or the vicechair.

#### Riding Office Staff Members

Staff members in MPs’ personal riding offices take care of the lawmaker’s appointments and appearances in the riding. They also serve as caseworkers who help to resolve the problems of the riding’s citizens as they relate to federal programs. For example, a riding office member can help determine why a Canadian Pension Plan recipient’s cheque is late. Members of the riding office staff are not usually involved in issues of public policymaking. They are, however, trusted sources of information and have frequent contact with the politician.

### Making a Telephone Call

When time is short or an issue is very pressing, you may be asked or may choose to communicate with an elected official by telephone.

The guidelines for making an effective telephone call to an MP’s office are similar to those for effective letter writing, with a few additions. You can reach your MP’s Ottawa office by dialing the Canadian Government Public Information Office at (613) 992-4793, giving the name of your MP, and asking to be connected with her or his office.

When preparing for a telephone call, start at the beginning, just like you would in a letter. Remember that the person you talk to may have just gotten off the telephone with another constituent who had a very different concern. Be prepared with facts and information at your fingertips and a clear idea of what you want your telephone call to achieve.

Before placing a call, make sure:

* you have a clear idea of the message you want to communicate. Write the main points down and, if needed, refer to them when you make your call. If you know the bill numbers, reference them in your call.
* your facts and arguments are organized in a clear, coherent manner. You will have only a few minutes to make them.
* you can state exactly what action you want taken on the issue.

You can ask to speak to your MP, but don’t be disappointed if they are not available. Next, ask to speak with the assistant who handles the subject of your interest. This is often just as effective. If neither the MP nor the relevant staff members are available, you can ask for a return call or leave a brief message, such as, "My name is Dr. Jones and I am a professor of psychology at the University of Hometown. I am calling to ask for the MP’s support on...". Be prepared to give your address or telephone number in case the MP wants to respond.

Be persistent but courteous. You may have to call back several times before you get through to either the staff person or the MP. Don’t be discouraged—no one is trying to avoid you. MPs get many calls each day—keep trying.

*\*Above text adapted from* <https://cpa.ca/documents/advocacy_p5.htm>