

Meeting with Legislator Or Legislative Staff

Here are some general guidelines for meeting with any elected official or their staff. Before the meeting, designate a **chief spokesperson and note taker**.

1. **Introduce** yourself and each member of your team. Tell them what each of you do for UC and if you are a constituent in their district, emphasis that.
 - What you do in **your job**
 - How long with UC
2. Give them your **business card**.
3. Tell them **what UPTE is**.
 - Staff union representing over 12,000 UC workers
 - RX, TX, and HX and briefly what each units is.
 - All 10 campuses plus the 3 National Labs managed by UC.
4. Give them a **Fact Sheet** which points out the issues to be discussed. UPTE usually has one on each subject that we are working on. Check out the Legislative web pages at the UPTE web site or call Rodney at 805-455-2813.
5. **Stay on track**. Speak only to the issue being addressed unless the person you are meeting with wants to talk about something else.
6. If you can incorporate a **personal experience** to the issue, that helps. For example, if talking about research grant money not being used by UC to keep wages competitive, tell them that your lab has lost 6 SRA's in past 18 months and that you spend an inordinate amount of time training new people in your lab.
7. **Ask them** if they would be willing to help us with the issues, do they support the legislation, or could they suggest possible solutions (Constitutional amendment, Assembly resolution, Congress contacting and pressuring UC, a Legislative hearing, or???)
8. Ask them if their office is working on any issues or carrying any legislation that UPTE **could possibly support or help them with**.
9. **Thank them** for the meeting and tell them that you will stay in touch or keep them posted.
10. Have someone **Take Good Notes and note required Follow Up needed**.

Other helpful pointers...

- Schedule a meeting in advance if at all possible. Each Legislator has their own preferred method (phone, fax, e-mail). To get contact information, just search for United States Senate or California State Senate, click on Senate, House of Representatives (federal), or State Assembly) and then look up the member you are looking for.
- When requesting a meeting, let them know what the issue is. They may ask for your Fact Sheet or a letter describing the issues.

- Give them an idea how many people will attend and emphasis if some are constituents in their district or that UPTE represents members in their district.
- **Dress in Business Attire** (at least slacks and nice shirt) unless it is a big lobby day and we ask all to wear an UPTE shirt.
- Don't feel slighted if you meet with staff instead of the Legislator. Quite often the Member is far too busy and usually, **the staffer is the real expert** on any given issue (Higher Education, Budget, Labor, etc.).
- Do your homework and be prepared. Know the issues. Try and anticipate challenging questions, and prepare your answers ahead of time.
- Bring materials that help make your point. If you have statistical information or studies to back up your views, bring copies to give them.
- Don't be demanding. Let them explain their views **without interrupting** them. They often have input from many sources, such as fiscal agencies, state departments, or other groups with expertise on the issue.
- Follow up is important!
 1. Follow up with a thank you note
 2. Several days after your meeting, give them a call to see if they may have additional questions or anything new.
 3. Build a relationship with Legislators between your local and the Legislator and her or his office. Stop in to say hi occasionally. Check in to ask them if they are working on any labor issue that we could help with or consider. Attend their events in your area. Drop off or mail them UPTE newsletters or other important printed material.