

# Meeting With Your Legislator/Candidate—Tips For Success

## Advance Meeting Tip

- Plan to go in 2 or 3 person teams
- Decide in advance who will be team leader
- Plan to arrive a few minutes early
- If you are to be part of a team plan to meet outside the meeting location
- When team is assembled go in (on time)

## What To Do If?

- If your team is not there when it is time for the meeting, but you are.
  - Go in, offer a brief apology for the members who must be delayed, introduce yourself and start the meeting.

## Meeting Tips

- Have business cards ready
  - Present them to the receptionist if you are meeting in an office.
- Be courteous
- Be friendly and persuasive but not argumentative
- Introduce yourselves and your group
- Give broad overview of the issues and why they are important
- Keep it simple—add personal experiences if applicable
- Do not go into great detail on issues (unless requested and then only answer the questions you are asked).
- Be professional
- Don't get out lobbied
- Don't agree with an opposing position.
- Try not to make commitments. Report all commitments that we need to follow up on to GR staff.
- Leave the information kit.

## If You Don't Know the Answer

- It's OK.
- Just tell the Legislator, "I don't know, but I will find out and make sure you get the answer."
- Again, report the need for follow-up to GR staff.

## Meeting

- You are there to generate a dialogue with the legislator/candidate.
- Discuss CalCPA's issues.
- Discuss ways the profession might assist the Legislator in the Capitol or in the district.
  - **Note: Don't discuss money.**
  - Do mention Dollars & Sense

## If The Meeting Goes Badly

- Legislator/Candidate has no time to talk, or you are directed to meet with a staff member or campaign aide.
  - Same rules apply—courteous, understanding and respectful
  - Talk to staff about issues
- Present a brief overview and the information kit.
- Write a note on your business card and leave the package.

## Follow up!

- Send a thank you note regardless of the outcome of the meeting (see sample)
- Complete the feedback form and send it to: CalCPA; 1201 K Street, Suite 1000; Sacramento, CA 95814; or fax (916) 441-5354.

**Legislator/Candidate Meeting Feedback Form**

Meeting Date: \_\_\_\_\_

Your Name and Phone Number: \_\_\_\_\_

Legislator's/Candidate's Name: \_\_\_\_\_

Legislator's/Candidate's Staff Attending: \_\_\_\_\_

\_\_\_\_\_

CPAs Attending: \_\_\_\_\_

\_\_\_\_\_

Notes/Comments: \_\_\_\_\_

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**Please send completed forms to:**

Government Relations Division  
California Society of CPAs  
1201 K Street, Suite 1000  
Sacramento, CA 95814