

VISIT TO A PUBLIC POLICY MAKER:

Why visit? The purpose of meeting with your elected official(s) is to share your local experiences, educate them on the issues that are important to you and ask them to act on your policy priorities. A visit to a public policy maker is a great opportunity to demonstrate your priorities.

Who are the public policy makers? They are people who support issues, act on issues, and even fund issues. In the world of mental health and substance abuse, public policy makers include members of the county Board of Supervisors, members of the local City Councils, members of the local Mental/Behavioral Health Board, newspaper Editors, legislators (CA Assembly and Senate), CA Behavioral Health Planning Council, the Mental Health Services Oversight and Accountability Commission, and many others.

PREPARE FOR YOUR VISIT:

Research the public policy maker to determine how interested they are in your topic AND prepare for the meeting with fellow participants: Know who plans to participate in the meeting and define the roles for each participant.

- Outreach to a group of individuals (same or different agencies) that support your issue and bring them together.
- Consider having a leader for the group if you are including others in the meeting.
- Research the person you are visiting:
 - Review his/her website for information on their interest in your topic/mental health/substance use;
 - Find out what committees s(he) serves on that includes mental health/substance use;
 - Review his/her position during votes on mental health/substance use.
- Establish your message: pick one, no more than three, areas of discussion. Write them down and use them as a basis for the conversation. Practice the conversation.
- Prepare your questions: be sure what you are asking is pertinent to the message. Assign different team members to ask questions.
- If you have a particular "ask", make sure that it is clearly articulated and actionable by the person(s)/office.
- Practice the conversation. If you have too much to discuss save some for another meeting. Remember to stick to the message.
- Establish a date for the visit: determine who will be present for the visit:
 - Supervisor (BOS) and/or staff
 - Legislator (CA Assembly or Senate) and/or staff
- Confirm your visit the previous day to assure that there has not been a change in the meeting time, place, participants.

VISIT:

Be on time and bring prepared materials for all participants

- Launch the meeting: quickly introduce the topic of the meeting and the reason for the meeting

- **Introductions:** Have your team introduce themselves and the role (if any) they will be playing (area of expertise, geographic representation, other); have the individuals you are meeting with introduce themselves if appropriate
- **Focus:** Start the meeting with a focus on the specific policy issue of interest to you. Reference the materials you are providing (if any) and the basis for your interest in the topic.
- **STAY ON MESSAGE:** Prior to your meeting you have identified one (or a few) topics of interest and established key points for your discussion. Stick to those key points. Don't let your message become diluted. If the conversation wanders, it is the responsibility of the leader of the group to bring it back to the message(s).
- **Keep a local focus:** Share local experience and provide technical expertise from a local perspective. Use local data and local stories to fill out your discussion
- **DO NOT BE PARTISAN:** It is best to keep the discussion based on the merits of the policy or issue. Do not characterize your position in partisan terms. You are working on an issue, not for a political party. You want legislators of both parties to support your position.
- **Make your "ask" (if appropriate):** Get a commitment for the action you request.

FOLLOW-UP:

- **Follow-up with the public policy maker:** what happens after a meeting is almost as important as the meeting itself. Consider sending some type of "thank you" letter after the meeting that reinforces your message and any commitment of support made by those you met with.
- **Send information:** If you agreed to send additional information, send it promptly.
- **Cultivate a relationship with the staff:** Do not underestimate the role of staff to the public policy maker. They are invaluable in shaping a legislator's agenda and position on issues. It is important that you make every effort to cultivate a positive working relationship with staff so that they see you as a possible resource for information on your issue.

WHAT IF?

- ***The individuals you meet with know nothing about the issue?*** People tend to specialize in a few areas of interest and may not know about your issue. Remember you are there to educate them. Be sure to bring written materials that will help you educate them. Know your material yourself so that you can answer questions.
- ***The individuals you meet with get off track?*** It is your responsibility to keep the discussion on the issue. A useful transition might be *"That's an important point. We have limited time today, so I'd like to return to our discussion on "*
- ***You don't know the answer to a question?*** Never try to answer a question if you are not sure of the answer. Jot down the questions and let them know you will get back to them with more information. Get contact information if necessary.
- ***I just want to drop in and not go through all of this...*** You can drop in and may or may not be able to talk with someone. Regardless, be prepared!