Engaging Legislative Champions

1. Who are you meeting with?

   _____

   a. What is their current position?
   b. Have they been supportive (of my issues) in the past?
   c. Are they a Committee Chair or hold any other powerful position (For instance, are they important in any of legislative caucuses?)

2. Making the Appointment

- ☐ Make the appointment at least three weeks from the time you are calling. (This will ensure enough time to recruit and organize the visit)
- ☐ When calling the local legislative office, ask to speak with the scheduler (the person who makes the appointments)
- ☐ Make it clear that the group will be constituents and you want to meet with the legislator, not a staff member. (If they ask how many people, tell them you will let them know prior to the meeting.
- ☐ Call and confirm the appointment a few days before the meeting.

3. Recruit constituents, participants for the meeting

- ☐ Recruit constituents to go to the visit from your contacts in the community and through your community organizations. Call through petition lists, any postcards, sign up sheets from meetings, etc.
- ☐ Be prepared before making phone calls by creating talking points and/or a phone script with all the details you'll need to tell people about the visit and your demands.
- ☐ Attendees to the lobby visit must be available to come to both the actual lobby visit and be able to meet an hour before the actual visit. They also must be willing and able to attend the "Pre-Meeting" so they are up to date on the issue, what we are asking and plan their role, if any, in the meeting.

4. The Pre-Meeting (1st meeting)

- ☐ Schedule a convenient time and place for the pre-meeting
- ☐ Have everyone introduce themselves
- ☐ Discuss the issue at hand and our goals for these visits
- ☐ Review who the legislator is, any meaningful history
- ☐ Review with your team the basics of lobbying/advocacy (what you are there to do as community members and constituents)
- ☐ Review or create the Agenda for the Lobby Visit

- ☐ Decide who will take what part on the agenda
- ☐ Plan logistics, where the meeting is, confirm time, and where you will all meet an hour before the visit.

5. The Pre-Meeting (2nd meeting), just before the lobby visit

- ☐ Review the Agenda
- ☐ Be sure everyone understands the hierarchy of demands
- ☐ Be sure everyone knows their piece of the agenda
- ☐ Remind the group that other issues should not be raised unless the lobby team has planned them.

6. At the Visit

- ☐ Follow the Agenda
- ☐ Remember to be aware of techniques that the legislator may use to avoid demands (diverting attention, talking about his/her history, saying there is no money)
- ☐ Keep control of the meeting
- ☐ Make your asks and record responses
- ☐ Share your personal story in relation to your ask
- ☐ Have a member of the group take notes of the entire meeting, putting special emphasis on any follow-up needed.

7. Follow Up

- ☐ Discuss the visit with the team; did you all hear the same thing?
- ☐ Divide follow-up tasks among willing participants
  - Who will make sure a Thank You letter is sent that reminds the legislator about what he/she committed to and what we ask of them?
  - Was their any information the legislator requested that should be sent?
  - Will the note taker type up notes for the local committee's and Citizen Action's records?
- ☐ Follow up on follow up

Congratulations – you've just done a successful Advocacy Visit!

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CITIZEN ACTION OF NEW YORK

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