

Advocate Meeting Checklist



Directions

- 1 Read list to understand your responsibilities before, during, and after the meeting.
- 2 Check items off as they are completed.
- 3 Pay special attention to deadlines associated with preparation and follow-up.

I. Before Meeting with a Legislator or Staff

Prepare effectively for your meeting .

- Read advocacy packet and policy factsheets / backgrounders *(2-4 weeks before)*
- Identify and practice your story with family, friends, or a colleague *(2-3 weeks before)*
- Learn your policymakers policy positions - i.e. review their website, search Google, etc. *(1-2 days before)*
- Review recent news or social media activity about the policymaker *(1-2 days before)*

II. During Meeting with a Legislator or Staff

Remember you only have 10-30 minutes to meet with each Legislator. Be polite, professional, and focused on these priorities. Read the list beforehand to be prepared.

- Explain the impact of the policy issue in question through a personal story
- State the specific policy ask and wait patiently for a concrete response
- Write down any questions or policy positions stated by the policymaker or staff
- Leave behind printed materials like booklets or one-pagers

III. After Meeting with a Legislator or Staff

Stay active after your meeting.

- Submit a meeting report to your organizational representative *(same day)*
- Share your experience on relevant social media sites *(same day)*
- Write personal, hand-written note thanking policymaker and staff for the meeting *(1-5 days after)*
- Schedule a follow-up meeting in the district *(4-6 weeks after)*

If you have any questions, please contact [insert grassroots manager name] at [email address or phone number]