

## Tips for A Successful Legislative Visit

### ASSIGN ROLES

These roles are flexible based on the number of people in your group, the length of the visit, and whether you have stories to contribute.

**LEADER(S):** Confirms meeting time and location. Introduces the group or, in a small group, allows everyone to do so. Introduces your congregation and Reform CA briefly or assigns another. Ensures that the visit is on track and that everyone has a chance to speak. Collects business cards from legislative staffer at beginning and leaves the legislative a copy of the Reform CA Legislative Agenda.

**ISSUE PRESENTER & STORYTELLER:** (A different person for each issue.) Delivers the message, makes it personal (by telling a story/ personal experience), and speaks to why the legislator should act. Makes “the ask” and is prepared to respond depending on the legislator’s position. (These roles may be divided.)

**RECORDER:** Fills in the Lobby Visit Report Form and records any questions, commitments made, or follow up requested during the meeting. Sends report form to Reform CA.

**SUPPORTING ADVOCATES:** Sign the office guest book. Take pictures of group during visit. Tweet about experience after the visit. #ReformCA. Write a thank you note.

### SUGGESTED MEETING FORMAT

#### OPENER:

- Express thanks for meeting with the delegation; collect business cards from staff and legislator.
- Introduce the group. Provide BRIEF intro to your congregation and Reform CA: who they are, how many they represent (Reform CA has 90 congregations representing 150,000 people).
- Tell why you are here: to advocate for World We Want Legislative Agenda. Thank legislator for something we appreciated (vote, cosponsor) if possible.

#### ISSUE PRESENTATIONS (use format for each issue):

- Decide in advance which bills you will focus on, probably no more than 4.
- State the problem that must be addressed by policy change.
- State the policy solution and why your congregation and Reform CA support this position.
- Personal story: Share your experiences or perspective.
- Ask if they will support the bill(s).
- Wait for response – be sure to listen! Offer to be a resource or to send additional information.

#### WRAP UP:

- Remind them that the issues discussed are part of a larger World We Want Legislative Agenda
- Review comments, commitments, and follow-up requests for each issue.
- Invite Legislator to come to your congregation.
- Thank legislator/staff for their time.
- Leave your business card and legislative visit folder that includes NCJW’s talking points.

#### DEBRIEF:

- Meet outside of the building to discuss the visit; help Recorder fill out the Lobby Visit Report Form.
- Discuss any requests for additional information made by the congressional office; delegate follow-up tasks to the group.
- Assign someone to write thank you notes to everyone you met with and to the legislator, briefly restating your issue messages. If you met with legislative aides, be sure to mention them in letter to legislator.
- Send report form to Reform CA.

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### DO

- DO** be on time and prepared. Arrive early to allow time to get through security and find the room.
- DO** be prepared to meet with a staff member rather than your elected official. Staff-level meetings can be quite meaningful, as staffers are the experts who work closely with members of Congress and track constituent input on issues.
- DO** say which individuals and how much of your congregation live in the legislators district.
- DO** practice what you want to discuss with the decision maker in advance. Stay on message, stick to your key talking points, and ask specific questions.
- DO** share personal stories with your legislator when it will help to convey your message on the issue. Personal stories are the most effective thing you can do.
- DO** admit if you don't have an answer to a question. You are not meant to be an expert and may have to follow up later.
- DO** leave materials on the Reform CA legislative agenda and your congregation with your elected officials.
- DO** thank whomever you meet with at the beginning of your visit and at the end.
- DO** Follow up the meeting with a thank you note to everyone you met with, briefly re-stating your "asks".
- DO** debrief with your delegation afterwards to compare impressions of what you heard in order to fill out the Report Form. Also, discuss what went well, what could have been done better, what questions still need answers, and congratulate yourself for speaking out!

### DON'T

- DON'T** argue with your legislator or the staffer. Make your points politely and stay on message. If needed, agree to disagree.
- DON'T** try to introduce everyone if you have a large delegation. Instead, say where in the district/state your delegates live.
- DON'T** allow any one speaker or issue to take up all of the time (you might only have 15 minutes). Watch the clock and be prepared to ask if you may move on to another issue.
- DON'T** allow your legislator to hijack your time by focusing on issues that you did not come to discuss (often legislators want to share with you just how much they support Israel). Thank them politely for sharing, but take charge by offering, "we are not here to talk about Israel today, but to discuss... ."
- DON'T** get off message. Keep to the World We Want Legislative Agenda. Do not try to add in your own personal issue – it will dilute the effectiveness of your advocacy. Stay on message before, during, and after the visit.
- DON'T** be intimidated by your legislators. As a constituent, you have every right to be there, to educate on your views, and attempt to persuade your elected officials.
- DON'T** make up a response if you don't know an answer, and don't make commitments on behalf of Reform CA and your congregation that you haven't talked about beforehand. Let the person you are meeting with know you'll get back to them after consulting with others in your congregation and in Reform CA.