

# 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. Briefly introduces your congregation and RAC-CA or assigns another to do so. Ensures that the visit is on track and that everyone has a chance to speak. Collects business cards from legislative staffer at beginning and gives the staffer the leave-behind document.

## ISSUE PRESENTER & STORYTELLER:

(A different person for each issue.) Delivers the message, makes it personal (by telling a story/ personal experience about why they care about the issue), and speaks to why the legislator should act. Asks legislator's view on issue and what bills are possible in 2019. (These roles may be divided.)

## RECORDER:

Records any questions, commitments made, or follow up requested during the meeting. Fill out brief RAC-CA reporting form at

<https://rac.org/CAindistrictreport>.

## SUPPORTING ADVOCATES:

Sign the office guest book. Take pictures of group during visit. Tweet about experience #RAC-CA.

Write a thank you note.

## SUGGESTED MEETING FORMAT

### OPENER:

- Express thanks for meeting; collect business cards from staff and legislator.
- Introduce the group: a BRIEF intro to your congregation and RAC-CA: who they are, how many they represent (RAC-CA represents 100 Reform congregations and 150,000 Reform Jews).
- Tell why you are here. Thank legislator for past vote or other action, if possible.

### SHARE YOUR CONGREGATION'S SOCIAL JUSTICE PRIORITIES:

- Tell them that RAC-CA works on six issues: criminal justice reform, immigrant justice, climate change, housing and homelessness, healthcare, and gun violence prevention.
- Share one or two – decided in advance. Don't share more than 2 priorities.
- Tell them why you care about the issue(s) as Jews and as Californians. Share a personal story about why one of you cares about the issue(s)
- Ask about the legislator's views on the issue(s) and what bills are possible to pass in 2019.
- Wait for a response – be sure to listen! Offer to be a resource or send additional information.

### RESEARCH FOR RAC-CA 2019 LEGISLATIVE AGENDA

- Ask what the legislator's priorities are in 2019.
- Ask what major bills legislator sees coming in 2019 in RAC-CA's 6 issue areas.

### WRAP UP:

- Remind them RAC-CA is holding similar meetings with legislators throughout CA.
- Review what you discussed today.
- Invite Legislator to come to your congregation.
- Thank legislator/staff for their time. Leave your business card and leave behind document.

### DEBRIEF:

- Meet outside of building to discuss the visit; help Recorder fill out Lobby Visit Report Form.
- Discuss any needed follow up. Delegate follow-up tasks to specific people in your group.
- Assign someone to write thank you notes, briefly restating your issue messages. If you met with an aide, also write to legislator, mention the aide in that thank you note.
- Fill out the brief RAC-CA reporting form ASAP <https://rac.org/CAindistrictreport>.

## RAC Tips for A Successful Legislative Visit

### DO

**DO** be on time and prepared. Arrive early to allow time to get through security (if applicable) and find the room.

**DO** meet beforehand to go over meetings roles and plan.

**DO** be prepared to meet with a staff member rather than your elected official. Meeting with the District Director (the most senior aide in a district office) can be as useful as meeting with the legislator.

**DO** say which individuals and how many of your congregants 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, share your personal reasons for supporting the bill, and ask specific questions.

**DO** share personal stories with your legislator – 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 expected to be an expert and can follow up later with a response.

**DO** leave materials on the RAC-CA and your congregation with your elected officials.

**DO** thank whomever you meet with at the beginning and at the end of your visit.

**DO** Follow up the meeting with a thank you note to everyone you met with and to the legislator, briefly restating your "asks".

**DO** debrief with your delegation afterwards to compare impressions of the meeting to prepare to fill out the Report Form

<https://rac.org/CAindistrictreport>. 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** just wing it.

**DON'T** meet with a junior staff member.

**DON'T** try to introduce everyone if you have a large delegation. Instead, say where in the district your delegates live.

**DON'T** allow any one speaker or issue to take up all of the time (you will have limited time). Watch the clock and be prepared to ask if you may move on to another issue.

**DON'T** get off message. Keep to your planned issues. Do not try to add in your own personal issue if it is not on the agenda – 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 to 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 RAC-CA or your congregation that you haven't talked about beforehand. If they bring up something unexpected, let the person you are meeting with know you'll get back to them.

*This guide is prepared by the Religious Action Center of Reform Judaism, adapted from materials by the National Council of Jewish Women. For more information, visit [www.rac.org/RAC-CA](http://www.rac.org/RAC-CA).*