

Tips for a Successful Legislative Visit

BEFORE THE MEETING: 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 the Reform Movement briefly 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 the staff member and leaves behind any written materials.

ISSUE PRESENTER & STORYTELLER: 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. Submits the report form.

SUPPORTING ADVOCATES: Sign the office guest book. With permission, take pictures of group during visit. Tweet about experience after the visit. Write a thank you note.

SUGGESTED MEETING FORMAT

I. OPENER:

- Express thanks for meeting with the delegation; collect business cards from staff and legislator.
- Introduce the group. Provide BRIEF intro for your congregation and the Reform Movement: who they are, how many they represent (the RAC works on behalf of the Union for Reform Judaism, whose nearly 900 congregations across North America include 1.5 million Reform Jews, and the Central Conference of American Rabbis (CCAR), whose membership includes more than 2,000 Reform rabbis).
- Tell why you are here: to advocate for the issue(s) you will be speaking on. Thank legislator for something we appreciated (vote, cosponsor) if possible.

II. ISSUE PRESENTATIONS (use format for each issue):

- Decide in advance which bills you will focus on, probably no more than 4.
- For each issue, your presentation should answer the following four questions:
 1. Why is this issue important to our country/state/district/city?
 2. Why is this issue important to us as Jews?
 3. Why is this issue important to you as an individual (personal story)?
 4. What, specifically, are you asking the official to do (e.g. co-sponsor a particular bill, vote for it or vote against it)?
- Wait for response – be sure to listen! Offer to be a resource or to send additional information.

III. WRAP UP:

- Review comments, commitments, and follow-up requests for each issue. If applicable, discuss any next steps or ways to deepen your relationship with the office.
- Thank legislator/staff for their time.
- Leave your business card and any written materials you have prepared to give to the office.

IV. DEBRIEF:

- Meet outside of the building to discuss the visit; help Recorder fill out and submit 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 a staff member, be sure to mention them in letter to legislator.

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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 the elected officials and track constituent input on issues.

DO say which individuals and how many in your congregation live in the official's 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 issues you spoke about 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 group (more than 10 people). 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 the person you are meeting with to shift the meeting away from issues that you did not come to discuss. Thank them politely for sharing, but take charge by offering, "we are here to discuss..."

DON'T get off message. Keep to the issues you've agreed to discuss. 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 the Reform Movement and your congregation that you haven't talked about beforehand. Let the person you are meeting with know you or a staff member will get back to them after consulting with others in your congregation and on the RAC staff.