



Unitarian Universalist Legislative Ministry
Action Network
California
www.uulmcaaction.org

Congressional and Legislative Meetings Step by Step

1. **Who are you meeting with?** _____
 - a. What is their current position?
 - b. Have they been a supportive in the past?
 - c. Are they a Committee Chair or hold any other powerful position?
 - d. Have they had other contacts with UU Legislative Ministry Action Network?
 - e. What's a reasonable goal for the meeting?

2. **How do you get the lobby meeting scheduled?**
 - Make sure you give yourself enough time between calling for the meeting and the date of the meeting to recruit and organize a delegation.
 - When calling the local legislative office, ask to speak with the scheduler.
 - Make it clear that the group will be constituents and you want to meet with the legislator, not a staff member, if possible. Often this is not possible, so be prepared to work through their staff system. Information gathered from visits with staff often gets to legislators within 24 hours. (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. **Who should attend the lobby meeting?**
 - Recruit constituents to go to the meeting who live in the district.

Consult with the UULM AN office administrator to find UUs who live in your legislator's district.

- If possible, recruit your local UU minister and/or community ministers to come with you.
- You should include people who have stories to tell about their own experiences, (for example health care stories), relevant professionals, small business people, and people who have relationships with the target and who can move him/her.
- Attendees to the lobby visit must be available to come to both the actual lobby visit and be able to meet before the actual visit to prepare. They also must be willing and able to attend the "Pre-Meeting," usually scheduled ½ hour before the lobby visit, in a nearby coffee house, so they are up to date on the issue, the agenda for the meeting and their role.

4. What should you do to prepare for the lobby visit?

- You should hold a **pre-meeting ahead of time that everyone can attend so that you can review the agenda and details for the meeting.** This can be held immediately before the lobby visit or a day or two ahead of the visit.
- You should prepare an agenda for the lobby meeting and talking points to guide each speaker.

5. What should you do in the pre-meeting?

- Have everyone introduce themselves.
- Discuss the issue at hand and our goals for this visit: for example, to endorse a public health insurance plan, to endorse the Human Right to Water bill, to take a stand for marriage equality.
- Review who the legislator is, any meaningful history.
- Review the Agenda for the Lobby Visit.
- Decide who will take what part on the agenda, including who will facilitate, who will take notes, and what each person will say.
- Prepare everyone for what the legislator may do to avoid the questions, to delay the meeting or to circumvent demands.
- Plan logistics—make sure everyone knows where the meeting is, how to get there, confirm time of the visit, a location to meet before the visit and a location where the group will debrief after the visit.

6. What happens at the lobby meeting?

- Follow the Agenda

- Remember to be aware of techniques that the legislator may use to avoid demands.
- Keep control of the meeting and keep the delegation and the legislator focused on your central purpose.
- Ask the legislator his/her position on the issue you are most concerned about on and record responses.
- Remember to emphasize your “Ask”—the key issue or action you wish him/her to support.
- Have a member of the group take notes of the entire meeting, putting special emphasis on any follow up needed.

7. What follow-up happens after the meeting?

- Immediately following the visit, reconvene the group in a location agreed upon ahead of time (could be the lobby of the building, the parking lot, etc) and trade notes--did you all hear the same thing?
- Review what you all did well and what you want to improve for the next visit.
- If the legislator has not signed on to the statement, discuss the next steps for moving this legislator. What did we learn during this visit that can inform the next conversation with this legislator?
- Divide follow tasks among the participants:
 - Who will send the Thank You letter?
 - Who will follow up with any additional information that the legislator requested during the visit?
 - Who will type up the notes to share with the group?
 - How will the information from this visit be communicated back to other UULM members, groups?
 - For Health Reform visits, Go to: <http://www.healthcareforamericanow.org> click on “Contact us” link at the top of the page; look for the link “Need to report a visit with a Member of Congress?” and fill out the form on-line.
 - In cases where the legislator met our demand, what can we do to publicly thank them?

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

This step by step outline is based on one prepared by Healthcare for America Now HCAN. As a coalition ally we are grateful for being able to adapt it for the Unitarian Universalist Legislative Ministry Action Network.