Visiting a Policy Maker: Advocacy Visit Planning Sheet

**The “ASK(S)”:**

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| **Prepare for the Visit** |

* Know something about the policy maker’s position on the issue; the policy maker’s web site is a good source of information.
* Come prepared with your story and your requests.
* Bring a business card if you have one. Bring a notebook and pen/pencil.
* Identify material worth printing and leaving with the policy maker, such as a fact sheet.
* Make a plan for the visit:
* Choose a spokesperson to start by giving a credential and introducing the group.
* Choose a time keeper for the visit.
* Decide who will say what.
* Choose a note-taker who will **send notes and a photo back to Creation Justice (info@creationjustice.org).**
* Think of questions and counterpoints that may come up, and plan responses.

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| **Make the Visit** |

* **Be on time**. Meet 10-15 minutes before the meeting is scheduled. Use time immediately before the meeting to review roles.
* When the meeting starts, ask the person you meet with how much time you have, and get their contact info.
* Explain who you are and why you are visiting. If you have a title like “Rev.” or “Chairperson” use it; it’s powerful. Credential yourself and your group. It is important to highlight your reach to fellow constituent voters. Also highlight your personal connection to the cause.
* If possible, connect with the policy maker by **thanking** them for something they’ve done.
* Explain the group’s ask. *What brings you to the meeting today? Why do you care about this issue? What, in particular, can this policy maker do to advance the cause?*
* **Pause for conversation. Ask what the policy maker has done, and intends to do, on your set of issues. Suspend judgement while listening. Truly seek to understand this point of view, and the values underpinning it.**
* Be polite and firm in explaining your position; avoid criticism. Be clear, concise, compelling and credible. Bring the conversation back to your message if it goes off track. **Use examples from your personal experience.**
* Ask for specifics on what the legislator is likely to do in the future about the issues you raised; Secure commitments for next steps if applicable.
* Record key points of the conversation and questions you can't answer. Volunteer to find information and get back to your policy maker if they have questions. If you don’t know the answer, find help from Creation Justice Ministries or other partners that may have expertise.
* Leave behind relevant materialsuch as fact sheets.
* **After the meeting, request a group photo with the policy maker, if they are available. Or their staff.**

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| **Follow Up on the Visit** |

* Choose a representative from your group to **send an email thank you note** with a summary of your ask and next steps, copying the rest of the group.
* Call or email with the answers to any questions you said you'd research.
* Continue the dialogue with your Member of Congress and her/his staff. Set up a time to follow up.

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| **Advocacy Visit Planning and Reporting Sheet** |

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| Policy maker |  |  | Office Location: |  |
| or staff: |  |  | Time of Visit: |  |
|  |  |  | Staff contact info: |  |

1. **Facts about the Policy Maker**

Party: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Hometown: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Religion: \_\_\_\_\_\_\_\_\_\_

When Elected: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ When up for re-election: \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Committees: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Record on related legislation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Other Positive Contributions: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **People making this visit:**

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*Tip: Have each person introduce her/himself by sharing name and where they are from. If you are a constituent, say so. Name groups you represent and tell how many people are involved in each.*

Introducer \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Note-taker \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Timekeeper \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Tip: Say something positive about the policy maker at the beginning of the visit.*

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| **Speaker**: |  | **Talking Point:** |
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*Tip: Tell a personal story that connects you with the issue.*

1. **Make the Ask:**

Answer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Tip: Don't let the Member/staff person take the conversation off track. Bring them back to your ask.*

1. **Follow Up**

Does additional information need to be sent to the Office? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What is the next step? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

What did the Member/staff commit to do? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Who will write the followup email? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. **Request a Photo.** *In the age of e-newsletters and social media, use a visit photo to spotlight your cause.*

***Please remember to send the names & contact information of each person in the visit, plus the group photo AND notes from the meeting to Creation Justice at info@creationjustice.org***