

ANATOMY OF A CONGRESSIONAL MEETING

Pre-Meeting Preparation: Research and Roles

- **Conduct your research on the issues and position of the legislator** on related votes. **Find something to thank the legislator for.** It doesn't have to be related to the issue you are there to speak about. You will mention this at the beginning of the meeting.
- **Identify roles and functions of team members before entering the legislator's office.**
 - **Speak with the person at reception:** Be respectful and friendly. Other staff, like the legislative director might be sitting in. Introduce yourself and team members and what organization you are with. If you have an appointment say who you are there to meet, at what time. Provide your team business card with names hand-written on it. Also chat with front office staff. We discovered that a receptionist (gatekeeper) in a Republican southern state was a UU from New York.
 - **Leader - Opens & Closes:** Keeps things on track. Asks how much time we have, leads introductions, provides meeting overview/why we are here, and closing thank you.
 - **Storyteller:** Delivers the message with a personal story, speaks to why the legislator should act. Speaks from the heart; provides the moral message.
 - **Subject matter point-person:** Provides a fact and can go in-depth on the topic if needed.
 - **Make the first "ask":** Make the clear ask and follow up depending on legislator's position. Invite the staff/legislator to respond if needed.
 - **Repeat the "ask" and summarize:** State what follow-up action is necessary. Hand over the letter/fact sheet.
 - **Notetaker:** Takes detailed notes on what the staffer or lawmaker says; takes input from members immediately following the meeting - in the hallway; submit report on the [UUSJ GoogleForm](#) or send to advocacy@uusj.org; debrief after your meeting(s) ASAP in your group - What did you learn? What could you have improved on?
 - **Time-keeper:** Makes sure the meeting moves along and ends on time.
 - **Post-meeting follow up:** Send thank you message. Repeat the "ask."

MEETING TIMELINE

OPENING (8-11 min.)

- **Small talk:** Early in the meeting ask how they are/make some small talk, where they are from, how long they been in Washington, D.C. (we're building a relationship) (2 min.)
- **Thank you for taking time to meet with us...:** Ask "how much time do you have for the meeting?" (1 min.)
- **Begin with an appreciation:** Thank legislator for a position on an issue or role that they have played. (1 min.)

- **Meeting overview: (4 min.)** Who you represent and why are you there?
 - The leader: start with “We’re here on behalf of X” (congregation/UUSJ, etc) or “We’re from the UU organization/congregation” that you are representing. We’re attending a conference on...”
 - Remind the staff/legislator about what UUism is about (your elevator speech) and UUSJ.
 - Briefly state the Issue or concern you are here to speak about, and the “ask.”
- **Personal introductions: (2-3 min.)**
 - Have a business card (blank card for team to sign) with your name and write the bill number or issue on it. The reception person may have taken it and given it to the staff person already. Or exchanged at the beginning of the meeting. Just make sure they have something with constituent names on it, separate from the team business card.
 - Introductions - briefly state name, state and hometown.

BODY (5-8 min.)

- **Tell a short personal story (2 min.)**
 - The last person to be introduced can start the discussion off with a story. Stories are powerful ways to change attitudes.
 - First-hand is best. Speak from your heart.
 - Or share an article from your state or hometown paper with a first-hand example.
- **Get to the issue and why should they act (6 min.)**
 - After the story you quickly restate the issue and why WE are moved to act and what motivates us to come here to talk about the issue.
 - Lay out a few reasons or facts about why you/we care and why it matters - moral grounding; speak from your heart.
 - Ask how they feel about the issue or why they have that position. Find out what they know and what their position for/against is on the issue.

ASK, RESPONSE & FOLLOW-UP (8-14 min.)

- **The “ask”: (6-10 min.) Most important part of a meeting**
 - Be as specific as possible “Will you vote yes/no...” “Will you speak up on the issue...” What is the Senator/Representative’s position/plan to address XX”... (2 min.)
 - Ask, then wait. Create a space in which they must respond. Listen for concerns and take note of them. (8 min.)
- **Follow up strategically on their response: (2-4 min.)**
 - Look out for a vague answer or hedge words; “I certainly care,” “I appreciate hearing your position.” You reply: “Specifically, can you support X action?”
 - If they have already done your first ask; ask for something harder. They may say: “I already co-sponsored the bill.” You reply: Great! Can you encourage the rest of the state delegation to also cosponsor it?
 - If they say no. Your reply: “I understand. Is there any more information I can follow up with that would help explain why I feel so strongly about this issue?”
 - If staff person says “I will take this back to the member.” You reply: When can you let us know? What are the next steps for finding out her/his official’s position?

CLOSING (3-5 min.)

- **Have a leave-behind: (1 min.)**
 - Provide a letter or factsheet from the group working on the issue, with the name of the group/congregation.
- **Closing/wrap-up: (2-4 min.)**
 - Ask “is there anyone else we should talk to about this issue/bill?”
 - Ask what legislation the legislator is championing that you might support.
 - Respectfully wrap-up, thank, clarify any needed follow-up. Say something like “we’ll be back and look forward to working with you in the future.”
 - Be sure you have their business card and that you’ve provided yours.
 - Be sure you know what you need to provide if there is any followup required or if you need to get an answer to a question, etc.

ASSESSMENT/DEBRIEF

- **Did we listen?**
 - Simple test: they should have talked more than you.
 - Take notes:
 - What did you learn about them personally?
 - What other issues are they working on?
 - Did you offer to get them more information on anything or put them in touch with anyone?
 - What intelligence did we gather on the issue (about supporters/and opposition)?
- **Honestly assess their support.**
 - Rate their support 1 (champion), 2 (yes vote), 3 (swing vote), 4 (no vote) 5 (will work to kill your bill).
 - Always err on the side of caution. Unless you hear “yes” at best they are a 3 or 4.
 - Make a note of both a ranking and why you gave it.

FOLLOW-UP

- **Send a thank you note with follow-up info as needed.**
 - Send a short thank you message for their time.
 - Get them in touch with anyone you offered to connect them with.
 - Pass along information you promised or where to find more information.
 - If you feel you fumbled the ask, politely include it in your thank-you.
- **Share what you learned.**
 - Let partners and congregants know how the meeting went and your assessment of their support.
 - As noted above, always err on the side of caution – unless you hear “yes!” they are at best a “maybe.” Consider what kind of follow-up would be helpful.
 - Amplify your meeting and outcomes with your congregation and partners as appropriate through newsletters, share a photo, post to social media, etc. but don’t share anything that was confidential or told as inside information.

Be prepared. Be polite. Be personal.

WHAT IS EFFECTIVE ADVOCACY?

Rank forms of communications from most effective (#1) to least effective (#13)

- ☐ Hold protest outside a congressional office.
- ☐ Write (and/or get published) an op-ed or Letter to the Editor that mentions a Member of Congress.
- ☐ Send (or fax) an individualized hand-written letter, email to a Congressional office.
- ☐ Meet with a Member of Congress or member of his/her staff.
- ☐ Send a form letter, fax or email to a Congressional office.
- ☐ Sign a petition delivered to a Congressional office.
- ☐ Hold up a sign at a rally, parade or march attended by a Member of Congress.
- ☐ Organize a coalition of people to meet with a Member of Congress or his/her staff.
- ☐ Tweet at a Member of Congress or post on his/her Facebook page.
- ☐ Attend your legislator's (or candidates) town hall meeting and ask a question.
- ☐ Add your name to an online petition.
- ☐ Send a letter signed by several community leaders to a Member of Congress.
- ☐ Call your Member of Congress.

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