Local, State and Federal Advocacy Visit Check List

NATIONAL COMMUNITY LAND TRUST NETWORK

Why Advocate?

Nonprofit organizations have critical knowledge and experience that must be communicated to decision makers in order for them to understand how their actions impact the lives of community members in their jurisdictions. Advocacy visits are a unique and powerful way to bring that knowledge to elected officials' offices. The Network used the checklist below to schedule and conduct 60 congressional visits in Washington, DC.

Arranging Your Visit

1. Contact the elected official at least two weeks in advance to request a meeting. You will probably be instructed to email their scheduler. When you do:
    - Ask for a 30 minute meeting but only expect to have 10-15 minutes.
    - Clearly state the issue(s) that you would like to discuss as well as the group that you represent.
    - Include details that are either specific to the official's district or to their committee role.
    - If the elected official is not available, ask to meet with a member of his/ her staff.
    - Don't take "no" for an answer and don't feel bad about pushing for a positive response. It is their job to meet with constituents.
2. Confirm your visit via email soon after making the appointment and again by phone the day before you are scheduled to meet.

Preparing for Your Visit

1. Learn about the elected official and their district by reading their press releases, website and public statements. Try to understand their political priorities.
2. Using what you've learned, determine what messages, stories and asks will be most persuasive. Connect your issues to the official's priorities and prepare a one- or two-page handout that summarizes your position. See the Network's *Advocacy Handout Template* for suggestions.
3. Prepare a succinct agenda with one clear message and talking points. After you crated your agenda, take a step back to ask how it connects to your community. See the Network's *Advocacy Visit Agenda Template* for suggestions.
4. If you are bringing multiple people to the visit, make sure that everyone has a role and is clear about how and when they will participate in the meeting.
5. Generate an "ask" that is actionable and timely.

During Your Visit

1. Be on time, positive and friendly.
2. Know your agenda and stick to your message. You may only have 10-15 minutes and you may be meeting in a hallway so identify the most critical information that must be communicated no matter what.
3. Take notes of the discussion and the names of staff. Make sure you get a business card for everyone who participates in the meeting.

4. Make your “ask” and secure a hard commitment on behalf of the elected official.
5. Take a photo with the official (if present) and get a quote for a press release.
6. Leave them with a handout (no more than two pages) that summarizes your organization, your issue(s) and your ask. See the Network’s *Advocacy Handout Template* for suggestions.

Following Your Visit

1. Debrief with your group.
2. Complete the Network’s *Advocacy Visit Report Form* for each visit.
3. Send a thank-you note or email and include any information that you promised to provide or any other follow-up steps.
4. Finalize your press release and send it out to the media.
5. Blog or tweet about your meeting.