

Guidelines for Lobbying Visits/Roleplays

1. If possible, make an appointment in advance. Call the legislator's secretary and identify yourself, your issue, and the time when you are hoping for a visit. If you are a constituent, state this. If not, you will likely be more successful if you make some kind of connection between the issue and the legislator. "Senator _____ serves on the Commerce Committee, and that committee is considering this legislation to raise the minimum wage." Make sure you leave a phone number where you can be reached, because the secretary will have to check with the legislator before scheduling the visit.
2. If you don't have an appointment, your best chance to catch a legislator is usually as he/she is entering or exiting the chambers, or by waiting in his/her office when you know there is not a committee in session. You can approach with something like, "Representative _____, my name is _____ and I wanted to speak with you briefly about (your issue). I called to try to make an appointment, but I know that you're busy, and I'm hoping that you have 10 minutes to speak with me now."
3. Once you have initiated the conversation (either, if you have an appointment, by introducing yourself at the appropriate time and place—make sure you arrive ~5 minutes early but are prepared to wait at least 10 minutes after your scheduled appointment to begin or, if you don't have an appointment, by receiving an affirmative answer to #2), your conversation should follow a general flow:
 - Use your social work assessment and relationship-building skills to ascertain whether 'small talk' is appropriate—often, in a scheduled visit, the legislator will want to engage in a brief chat before jumping to the issue—this is influenced by your relationship with him/her, the time constraints, and personal preference.
 - Segue into the issue at hand with a transition statement like, "I really appreciate your willingness to meet with me about the important issue of reimbursement rates for personal care attendants for persons with disabilities."
 - Briefly summarize the issue at hand (no more than 1 minute), your position on the legislation/issue, and its status. DON'T ask the legislator what he/she knows about the issue—it puts him/her on the spot and can take you down an unfruitful path.
 - Ask what questions the legislator has. Be prepared to answer as well as you can, but also do not be afraid to redirect the conversation back to your mission, if the legislator becomes distracted or begins a tangential discussion.
 - ALWAYS close with an 'ask'—a vote, a statement of support, a commitment to talk with colleagues—this ask should be tailored to how the conversation has gone to this point, your assessment of his/her support of your position, the legislator's position within the legislature (committee/party membership, etc...), and your particular needs at this point in the process.
 - If the legislator is supportive of your position, make sure you know if you can 'go public' with that information. It can be very helpful to share other policymakers' positions with their colleagues, but you don't want to anger a supporter by sharing information that he/she is not ready to divulge. You may want to ask for some kind of public statement, such as signing an endorsement or authoring an op-ed.
 - Leave information with the legislator, always. You should at least leave your contact information and some kind of summary of what you discussed (policy brief, usually), but you may want to prepare more extensive information, including media clippings, letters of support, or sample legislation. If possible, describe what you are leaving (it increases the chance that the legislator will read it).
4. If you are accompanied by other advocates, you should know in advance who will handle which part of the meeting, and you should also be prepared with signals or other ways that you will handle the question and answer dialogue.
5. Follow up your visit promptly (within no more than 48 hours) with a thank-you note and any additional information requested. You should also reference whatever was committed: "Thank you again for taking the time to meet with us about opposing restrictive bills on immigrants' eligibility for public benefits. We appreciate your willingness to vote against the bill in committee and on the floor. We are enclosing the talking points and summaries of other states' bills that you requested. Please let us know if there is anything else that we can do to support you in your work against this mean-spirited and short-sighted legislation."