Advocate Meeting Checklist

Directions

1. Read list to understand your responsibilities before, during, and after the meeting.
2. Check items off as they are completed.
3. Pay special attention to deadlines associated with preparation and follow-up.

I. Before Meeting with a Legislator or Staff
Prepare effectively for your meeting.

☐ Read advocacy packet and policy factsheets / backgrounders (2-4 weeks before)

☐ Identify and practice your story with family, friends, or a colleague (2-3 weeks before)

☐ Learn your policymakers policy positions - i.e. review their website, search Google, etc. (1-2 days before)

☐ Review recent news or social media activity about the policymaker (1-2 days before)

II. During Meeting with a Legislator or Staff
Remember you only have 10-30 minutes to meet with each Legislator. Be polite, professional, and focused on these priorities. Read the list beforehand to be prepared.

☐ Explain the impact of the policy issue in question through a personal story

☐ State the specific policy ask and wait patiently for a concrete response

☐ Write down any questions or policy positions stated by the policymaker or staff

☐ Leave behind printed materials like booklets or one-pagers

III. After Meeting with a Legislator or Staff
Stay active after your meeting.

☐ Submit a meeting report to your organizational representative (same day)

☐ Share your experience on relevant social media sites (same day)

☐ Write personal, hand-written note thanking policymaker and staff for the meeting (1-5 days after)

☐ Schedule a follow-up meeting in the district (4-6 weeks after)

If you have any questions, please contact [insert grassroots manager name] at [email address or phone number]