NCJW
National Council of Jewish Women

Advocacy Training Resource

Tips for Having a Successful Advocacy Visit

Plan a Successful Advocacy Visit

The key to a successful advocacy visit is planning and preparation.

BEFORE THE VISIT

- Decide who to meet with / which issues to discuss
- Set up an appointment
- Research legislator's history on the issues and/or relevant bills
- Assign roles for the meeting (see table below)
- Select materials you want to leave behind for the office
- Practice

DURING THE VISIT

- Be flexible – meeting times and locations often change last-minute
- Open the visit by introducing the organization and individuals in the room
- Thank legislator for something (vote, action in community, etc.)
- Make "the ask" by stating the issue and the action you want the lawmaker to take
    - Use personal experiences and stories to emphasize why the issue matters
    - Discuss no more than three issues per visit
- Offer to be a resource on the issue
- Gather information by asking questions about the issue or bill
- **Listen** - this is a conversation
- Wrap-up the visit
    - Review comments, commitments, and follow-up requests for each issue
    - Thank legislator/staff for their time; collect business cards from staff
    - Leave your contact information and advocacy materials

AFTER THE VISIT

- Debrief the visit away from the office
    - Discuss positives and deltas (things you would change)
    - Review all requests for additional information made by the congressional office; delegate follow-up tasks
- Send thank you notes, that restates the ask and include all requested follow-up materials
- Complete advocacy visit report form and return it to your section. If you're meeting with a federal lawmaker or agency, be sure to also send it to NCJW Inc.
- Stay in contact with the staffer or legislator after meeting to build the relationship

Advocacy Visit Roles

These roles are flexible based on the number of people in your group, the length of the visit, number of issues you discuss, and who has stories to contribute.

LEADER(S): Confirms meeting time and location; facilitates group introductions; provides overview of organization's mission and work; ensures the visit stays on message and on track; leaves advocacy materials at end of meeting.	**ISSUE PRESENTER(S) / STORYTELLER:** Delivers issue talking points; shares story/personal experience; makes "the ask;" responds to questions. (Consider a different person for each issue presentation.)
RECORDER: Takes notes of any questions, commitments made, or follow-ups requested during the meeting; completes advocacy visit report form.	**SUPPORTING ADVOCATES:** Supports meeting by taking pictures (with permission) and posts interesting pictures to social media; writes thank you note.

Best Practices

A few reminders to keep your visit on track and successful.

DO	DON'T
• Prepare roles, asks, and leave-behind materials in advance • Run early to allow time for security • Be flexible in the face of changing logistics • Say thank you • Practice time management • Keep on message and use pivot language if you get off-track • Use personal stories • Listen to answers and information shared • Debrief after a visit • Stay non-partisan	• Introduce everyone if there are more than five people; instead, introduce the organization • Make up a response to a question – instead, you can get back to them • Be led off topic by a fellow advocate, staff, or legislator • Spend so much time on the first issue that you run out of time to cover other issues • Argue with your legislator or the staffer – if needed, agree to disagree • Be intimidated – as a constituent, you have every right to be there