

## Advocacy Training Resource

# Advocacy Meeting Trainer's Guide

### Tips when using this guide:

- Be sure to review the script below and edit to fit your and your community's needs.
- The script below accompanies the Advocacy meeting PowerPoint presentation. It includes suggested time allotments for each slide for a 60-minute training. If you have more time, participants can role-play and practice what they learned.
- Questions for participants are indicated below with the word "ASK." Facilitators should ask the question, pause, and wait for responses. The bullets are possible responses.
- *Note: The following was adapted based on a training led by NCJW staff. The webinar recording is [available on our website](#).*

### SLIDE: Opening Slide

2 Minutes

- Welcome to NCJW's training, How to Have a Successful Advocacy Visit.
- Introduce yourself
  - ASK: Ask participants to share name, pronouns, and why they are interested in advocacy visits
  - *Note: Pronouns refer to an individual without using their name. Since gender is a spectrum, the pronouns one uses to express their gender are important. To make others feel comfortable, ask an individual's pronouns to allow them to share their pronouns. For more information, read [Gender Diversity and Judaism: An NCJW Guide](#).*

### SLIDE: Introduction

5 Minutes

- Advocacy visits are one of many ways to move our issues forward
- Skills in this training are transferable – you can utilize them any time you are trying to share views and advance advocacy goals
- Recently, we're seeing a lot of people wanting to engage civically, either for the first time or in ways they haven't previously been involved
- As a reminder, NCJW is a 501c3 organization; **we work on policy issues – not candidates**. Our training today will be a non-partisan, 501c3 friendly training.
- Agenda
  - Discuss best practices before, during, and after your advocacy visit

- We'll practice with role-plays
- ASK: Are there any questions before we get started?

## SLIDE: Plan Your Visit

10 Minutes

- Consider: Who do you want to visit?
  - What do you want your visit to be about? This will help you decide with whom you want to meet
  - Do you want to...
    - Talk about an issue or about specific legislation or policy?
    - Build a relationship with a leader, staff, or elected officials?
  - Do you want your visit to be at a local / state / federal level?
    - Town Council; Mayor; State Senator or Representative; US Senators or Representative
    - State or Federal agency, like Department of Health
- Set up an appointment
  - Call / email the office of the person you want to visit – be persistent, put it in writing
  - Share how many people will attend and what issues or bills you want to discuss
    - This ensures that the appropriate staff meets with you to discuss those issues. Frequently you are not meeting with your elected official but a staff member who is an expert in that issue
  - Email a day or two before the appointment to confirm the time and place
  - Print out and bring a copy of the confirmation with you on your visit
- Research
  - What do you want to thank the lawmaker for, and what is your “ask”?
  - What can you say thank you for? If nothing else, remember to thank them for their time
    - A thank you can go a long way toward having a congenial visit, even with a person you disagree with. It does not have to be related to the issue you have come to speak about
    - Look at past voting record
  - What's the ask(s)?
    - This is this specific information you want to take away from the visit or the specific request you want to make
    - Are you asking them to cosponsor a piece of legislation, or support or oppose? Are you asking them for an update on an issue?
- Assign roles to others joining you on the advocacy visit
  - Leader – sets up the visit, introduces participants & NCJW
  - Issue presenter – delivers the ask

- Timekeeper – makes sure the visit stays on track
- Note taker – record any questions / follow-ups during the meeting
- Others present can prepare materials for meeting, take photos, post on social media, collect business cards
- Materials
  - Think about what information you want to leave behind for the office
    - Op-eds, talking points, brochures, business cards (if you don't have any make sure you include your contact information on the materials)
- Practice, Practice, Practice
- ASK: Does anyone have any questions about preparing for a visit?

### **SLIDE: During the Visit**

**5 Minutes**

- Be flexible
  - Meetings can change on a dime
  - You may not be in an office; it may not be the person you planned to meet with
- Open
  - Arrive 5-10 minutes early to your meeting
  - Introduce who's in the room
    - Name, pronouns, and organization you are with
    - Reiterate why you are there
    - Say thank you
- The Ask
  - State the issue
    - Use stories. They personalize the issue and make it more memorable
    - If you're using someone else's stories, make sure to ask permission
  - State clearly what you want from the lawmaker
    - What can the lawmaker do? Cosponsor / vote yes or no / speak publicly / talk to other elected officials / introduce a bill / share information
  - Ask: "Will you/my representative vote \_\_\_\_ on \_\_\_\_?"
    - Ask the question clearly so that the staff person gives you a response
  - Don't discuss more than 3 asks/issues per visit so you have enough time for each
  - Be sure to listen to the answer(s)
- Wrap Up
  - Review outstanding questions and follow-ups from the visit
  - Leave materials & exchange business cards
  - Say thank you
- Debrief
  - Debrief away from the office – what went well, what did you learn, what would you do differently next time, what are the next steps

- Make sure everyone in the visit is on the same page
- Make sure to follow up with the office – email is preferable

### SLIDE: After the Visit

2 Minutes

- Send thank you note with any follow-up information promised during the meeting. Be sure to send the thank you note even if your follow up materials aren't quite ready yet
- One person should fill out the 'advocacy visit report form' (available in the Related Resources folder) and return it to your section. If you're meeting with a federal lawmaker or agency, be sure to also send it to NCJW National
- Stay in contact with the staff and build the relationship
  - Part of being an effective advocate is by leveraging the relationships you've built
  - Staff tends to move around on Capitol Hill or in state capitals - you never know where they will wind up next

### SLIDE: Best Practices

5 Minutes

- Be early
- Do not make up a response if you do not know the answer. Let them know that you will get back to them
- If conversation shifts off topic, use pivot language to get back on message
  - "That deals with one aspect of a larger issue..."
  - "Good question. People may have that misconception, but the truth is..."
  - "Here's what I think is really important..."
  - "Yes, and in addition to that..."
  - "I'm not sure about that, but what I do know is..."
- Practice time management
  - Visits can be anywhere from 15 minutes to an hour depending on the issue, your relationship with the person, and the schedule of who you are meeting with
  - Ask at the beginning of the meeting how much time the lawmaker and/or staff have
  - Make sure the time keeper is keeping track of the clock
- Use personal stories to drive points home about issues
- **Stay non-partisan. NCJW is a 501(c)(3) organization**
- Social media → ask permission before taking or posting a photo
- Thank them for their time

### SLIDE: Role Playing

20 Minutes

During this section, you can draft your own script using the issues on which you will be advocating, or you can use the script included in the Toolkit. If you decide to draft your own, consider modeling two role plays – the first an example of a “bad visit” with mistakes, and the second an example of a “good visit.”

### **SLIDE: Questions and Closing**

**11 Minutes**

- Thank everyone for coming
- Does anyone have any questions?
  - *Tip: Brainstorm a few potential questions and answers beforehand*
- Discuss next steps
  - ASK: Do you have advocacy visits scheduled?
- Hand out resources
  - Tips for Having a Successful Advocacy Visit
  - 501c3 Status Do's and Don'ts