



Unitarian Universalists  
for Social Justice  
In the National Capital Region

## Anatomy of a Meeting

### Pre-Meeting Preparation: Research and Roles

- Conduct your research on the issues and the legislator's position. Find something to thank the legislator for that you'll mention at the beginning of the meeting.
- Assign roles before entering the legislator's office
  - **Leader:** Leads introductions, meeting overview/why we are here, closing, and generally keeps things on track. Asks how much time we have.
  - **Storyteller:** Delivers the message with a personal story, speaks to why the legislator should act. Speak from the heart; provide the moral message.
  - **Expert/Issue :** Provides a fact and can go in-depth on the topic if needed.
  - **Ask:** Makes the hard ask and is prepared to respond depending on legislator's position.
  - **Follow-up:** Summarizes follow-up and hands over the letter/fact sheet.
  - **Notetaker:** Takes detailed notes on what the lawmaker says; fill out lobby meeting report form; debrief ASAP in your group - What did you learn? What could you have improved on?
  - **Time-keeper:** Makes sure the meeting moves along and ends on time.

### Meeting Timeline

#### Opening: (5-8 min.)

- **Opening: Early in the meeting ask how they are/make some small talk (we're building a relationship) (2 min.)**
- **Begin with an appreciation: (1 min.)**
  - Also chat with front office staff. We discovered that a receptionist (gatekeeper) in a Republican southern state was a UU from New York.
  - If meeting with a staff person, ask where they're from, ask something personal, and ask what issues the staff person covers, etc.
- **Meeting overview: Who you represent and why are you there? (3 min.).**
  - The leader should start with "We're here on behalf of X" (congregation/UUSJ, etc) or "We're from the UU organization/congregation" that you are representing. Ask if the the staff/legislator is familiar with UUism and UUSJ, if not be prepared with an elevator speech.
  - Briefly state the Issue or concern you are here to speak about.

- **Begin with an appreciation: (1 min.)**
  - Thank legislator for a position on an issue or role that they have played.
- **Introductions: (2-3 min.)**
  - Have a business card (blanks card for team to sign) with your name and write the bill number or issue on it. Often exchanged at the beginning of the meeting.
  - Introductions - briefly state name, state and hometown.

### Body: (5-8 min.)

- **Tell a short personal story (2 min.)**
  - The last person to be introduced can start the discussion off with a story. Stories are powerful ways to change attitudes.
  - First hand is best, but authentic knowledge is OK. Speak from your heart.
- **Get to the issue and why should they act (6 min.)**
  - After the story you quickly restate the issue and why WE are moved to act and what motivates us to come here to talk about the issue.
  - Lay out a few reasons or facts about why you/we care and why it matters - moral grounding; speak from your heart.
  - Ask how they feel about the issue or why they have that position. Find out what they know and what their position for/against is on the issue.

### Ask, Response & Follow-up (5-14 min.)

- **The “ask”: (5-10 min.) Most important part of a meeting**
  - Be as specific as possible “Will you vote yes/no...” “Will you speak up on the issue...” (2 min.)
  - Ask, then wait. Create a space in which they must respond. Listen for concerns and take note of them. (8 min.)
- **Follow up strategically on their response: (2-4 min.)**
  - Look out for a vague answer or hedge words; “I certainly care,” “I appreciate hearing your position.” You reply: “Specifically, can you support X action?”
  - If they have already done your first ask; ask for something harder. They may say: “I already co-sponsored the bill.” You reply: Great! Can you encourage the rest of the state delegation to also cosponsor it?
  - If they say no. Your reply: “I understand. Is there any more information I can follow up with that would help explain why I feel so strongly about this issue?”
  - If staff person says “I will take this back to the member.” You reply: When can you let us know? What are the next steps for finding out her/his official’s position?

### Closing (3-5 min.)

- **Have a leave-behind: (1 min.)**
  - Provide a letter or factsheet on the issue, with the name of the group.

- Cut out a recent news article and write a note, ie “Hope you saw this” or “Thanks for your position.”
- **Closing/wrap-up: (2-4 min.)**
  - Ask “is there anyone else we should talk to about this issue/bill?”
  - Ask what legislation the legislator is championing that you might provide support.
  - Respectfully wrap-up, thank, clarify any needed follow-up. Say something like “we’ll be back and look forward to working with you in the future.”
  - Be sure you have their business card and that you’ve provided yours.
  - Be sure you know what you need to provide if there is any followup required or if you need to get an answer to a questions, etc.

## Assessment/Debrief

- **Did we listen?**
  - Simple test: they should have talked more than you do.
  - Take notes:
    - What did you learn about them personally?
    - What other issues are they working on?
    - Did you offer to get them more information on anything or put them in touch with anyone?
    - What intelligence did we gather on the issue (about supporters/and opposition?)
- **Honestly assess their support**
  - Grade their support 1 (champion), 2 (yes vote), 3 (swing vote), 4 (no vote) 5 (will work to kill your bill).
  - Always err on the side of caution. Unless you hear “yes” at best they are a 3 or 4.
  - Make a note of both a ranking and why you gave it.

## Follow-Up

- **Send a thank you note with follow-up info as needed.**
  - Send a short thank you message for their time.
  - Get them in touch with anyone you offered to connect them with.
  - Pass along information you promised or where to find more information.
  - If you feel you fumbled the ask, politely include it in your thank-you.
- **Share what you learned.**
  - Let partners and congregants know how the meeting went and your assessment of their support.
  - Remember; always err on the side of caution – unless you hear “yes!” they are at best a “maybe.”
  - Amplify your message as appropriate through newsletters, eNews, social media, etc. but don’t share anything that was confidential or told as inside information.



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## WHAT IS EFFECTIVE ADVOCACY?

Rank from most effective (#1) to least effective (#13)

- Hold protest outside a congressional office.
- Write (and/or get published) an op-ed or Letter to the Editor that mentions a Member of Congress.
- Send (or fax) an individualized hand-written letter, email to a Congressional office.
- Meet with a Member of Congress or member of his/her staff.
- Send a form letter, fax or email to a Congressional office.
- Sign a petition delivered to a Congressional office.
- Hold up a sign at a rally, parade or march attended by a Member of Congress.
- Organize a coalition of people to meet with a Member of Congress or his/her staff.
- Tweet at a Member of Congress or post on his/her Facebook page.
- Attend your legislator's (or candidates) town hall meeting and ask a question.
- Add your name to an online petition.
- Send a letter signed by several community leaders to a Member of Congress.
- Call your Member of Congress.