Lobbying Meeting Checklist

Use this checklist and the question prompts to prepare for an in-person meeting with a public official.

___ Identify the Issue
What is your organization’s position? And why?
Has the board approved the position? Yes No If “No,” be sure to get board approval.

___ Research the Issue
What are the existing laws and regulations on your issue?
What are the proposed laws and regulations on your issue?
What are key data points you have or need to gather?

___ Develop Your Ask: What do you want the official to do?

___ Decide Who to Meet and Research the Official
Who do you want to influence? Why do you want to influence them?
Are they the official who represents your organization’s physical location(s)?
Do they serve on a committee impacting your issue?
Do they have a connection to your issue or organization?
How have they voted previously on your issue?
Who funds their campaigns? Are their contributors related to your issue?

___ Request the Meeting Date
Confirm the number of seats and if there is information you should share in advance.
Accept a phone call with the official or a meeting or call with their staff if the official is unavailable.

___ Assemble the Delegation
Best practice is to include constituents, clients, and board members, if appropriate.

___ Prepare Your Data to Share with the Official
What do you want the official to know? What can you convey about your service in their district?
Do you have hard numbers and/or anecdotes to share?
Is your data presented in an easily understandable format?

___ Prepare for the Meeting
Assign speaking roles and develop an agenda with talking points aimed toward making the ask.
Develop a list of questions for the official to answer.

___ Attend the Meeting
Make the ask!
Exchange business cards and proactively offer to send follow up items.
Take a picture, if appropriate.

___ Say “Thank You” via U.S. Mail, Email, and Social Media

___ Deliver Follow Up Items and Stay Connected
Ask if staff would like to join your email list.
Invite the official to visit your organization.
Subscribe to the official’s email list and have your agency represented at their town hall events.

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Grassroots Lobbying Checklist

*Use this checklist and the question prompts to prepare for a grassroots campaign.*

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**Identify the Issue**

What is your organization’s position? And why?
Has the board approved the position?  
Yes  No  *If “No,” be sure to get board approval.*

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**Research the Issue**

What are the existing laws and regulations on your issue?  
What are the proposed laws and regulations on your issue?  
What are key data points you have or need to gather?

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**Develop the Ask: What do you want the official to do?**

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**Decide Who to Contact**

Who do you want to influence? Why do you want to influence them?
- Are they the official who represents your organization’s physical location(s)?
- Do they serve on a committee impacting your issue?
- Do they have a connection to your issue or organization?
- How have they voted previously on your issue?
- Who funds their campaigns? Are their contributors related to your issue?

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**Determine who are you mobilizing (circle):**  
Clients  Board Members  Staff  Other________

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**Decide how are you mobilizing activists (circle):**  
Email  Social Media  Phone  U.S. Mail

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**Define what will your activists do (circle):**  
Call  Email  Social Media  Write  Other________

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**Develop an Activist Tool Kit for the Campaign that Contains:**
- Instructions on when to act; how to act; and how to report actions taken (for tracking).
- Boilerplate messages intended to be personalized.
- Contact information for officials.
- Images to share via social media, if appropriate, along with sharing instructions.

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**Prepare an Action Alert**

- Explain why you are taking action.
- Explain how to take action using the tool kit.
- Set a deadline for taking action.
- Request any follow up or reporting for performance tracking.
- Include a point of contact from your staff to answer questions.

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**Send the Action Alert**

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**Track Performance and Participation**

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**Follow Up the Campaign with In-Person Meetings with Officials**