

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.

Grassroots Lobbying Checklist

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

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

___ 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?

___ Determine who are you mobilizing (circle): Clients Board Members Staff Other_____

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

___ Define what will your activists do (circle): Call Email Social Media Write Other_____

___ 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.

___ 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.

___ Send the Action Alert

___ Track Performance and Participation

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