All About State Advocacy Days

Want to raise attention for planning issues in the state? To make sure you've got a seat at the table when legislators are considering bills that might impact your work? Studies have shown that in-person issue visits from constituents are the number one way to influence legislators and their staff. An advocacy day at the State Capitol may be just what you need to raise visibility and get your message across. This guide will show you how. We'll cover:

- Setting the Stage
- Gathering Information
- Initiating Meeting Requests
- Scheduling Meetings
- Scheduling Other Advocacy Day Activities
- Reporting
- Staffing the Event

We've also included a timeline so you can be sure to keep on track!

Step One: Setting the Stage

To have an effective (and fun!) event, you'll need to start out with a strong plan. You'll want to look at standard structures for meetings, timeframe, fees, and who will manage the scheduling process

Constituent/Lawmaker Connection Practices

State legislatures come in many different shapes and sizes--and they all handle meetings with constituents differently. There are usually three approaches:

- Legislators expect advocates to schedule a specific meeting time through their office
- The legislature sets aside a specified date and time every week for advocates to "stop by"
- Advocates can feel free to stop by at any time

The first approach is the most common, but it's essential you understand how it works before diving in. The best way to do so is to check out your state legislature's website. You'll usually find a link related to meeting with legislators or visiting the capitol in general.

Timeframe

State legislatures also differ in their session dates and times. Some meet once every two years, some meet year round. Questions to think about include:

- Will the legislature be meeting for only a limited time? If so, make sure you're setting up your event within that timeframe. If you're not able to do so, consider whether organizing an event around meetings with staff makes sense. Often, staff meetings are far more effective than those with the legislator him or herself!

- Is there a set time of year when decisions will be made? If, for example, you're advocating on a budget-related issue, it may make sense to hold your event early in the year.

Fees

The question of whether or not to charge for the event can have a tremendous impact on turnout--obviously, the lower the cost, the higher the attendance. You'll want to think about the following:

- Will you charge advocates? If so, how much?
- If the advocacy day is part of an existing conference, will there be an additional fee to participate?
- For stand-alone events, will advocates be charged a fee to cover nominal costs, such as food and drink? Or will there be a registration fee to cover all costs of the event?
- Will charging a fee limit the ability of advocates to attend?
- Will you be able to offer any travel scholarships or registration fee waivers?
- Will you have a special student rate? Can you offer school credit as an incentive to get students to join?

Scheduling Process

For those states where you'll need to set up separate meeting with legislators or staff, you'll want to have a plan for exactly how that will happen. Scheduling can occur under one of several constructs:

- Advocates schedule their own meetings: If considering this approach, you should work with advocates to group meetings together as possible. It's often best to appoint a coordinator for each section of the state (or for each legislative office you're meeting with). In other words, try to avoid having several advocates call the same office.
- You and/or a central organizer schedules: If considering this approach, plan to spend anywhere from ten to fifty hours actually getting the meetings scheduled.
- Scheduling firm: Some organizations hire outside firms to schedule meetings. If taking this approach, be sure to look into the firm's experience specifically in scheduling legislative meetings. Some conference management firms may claim to understand the ins-and-outs, but actually aren't familiar with the legislative environment.
- Combination: Finally, some organizations schedule meetings through a combination of approaches. For example, some meetings may be arranged by advocates, while others might be arranged by an outside firm. If considering this approach, you should look for ways to maintain a master calendar so you know where everyone is going, and to be sure no one is stepping on anyone else's toes.

Step Two: Gathering Information

When putting together your registration materials, be sure to collect as much of the following as possible:

- Policymaker contact information, including location, phone number and staff names. Additional useful, but not essential, information includes committee assignments and biographical information.
- Advocate contact information, including full street address, affiliation, phone numbers (including cell phones) and e-mail addresses. Be sure the full street address given is the address the advocate wants to use for purposes of matching with legislators. For example, if an advocate wants to meet with a legislator representing a business interest, the address given should be for that business. If an advocate wants to meet with the legislator that represents them at home, the home address should be used.
- Zip-code matches of advocates with relevant policymakers (in the case of the legislature). Elected officials want to meet with their constituents, or those representing their constituents. Matching zip-codes with legislator districts helps you be sure you've got the right advocates meeting with

the right people. You can also consider the legislators associated with different projects in your area--sometimes projects cross legislative lines, which means you have "ins" with several offices.

- Additional information, knowing the travel plans of advocates (to limit requests to change meeting times due to travel conflicts), details on other meetings being scheduled and "day-of" contact information can help mitigate any on-site chaos.

Step Three: Initiating Meeting Requests

Once you've gathered information about policymakers and attendees, the next step is to initiate meeting requests. Whether you're doing this or it's being managed by the advocates, the following details should be included in the meeting request letter:

- Names and, where appropriate, affiliations of constituents requesting the meeting.
- Details on of constituents attending: This information helps the policymaker's staff know that constituents are asking for the meeting. Many offices simply will not schedule meetings without this information.
- Details on time constraints: Including information at the outset about when individuals are available for meetings can help mitigate any scheduling conflicts. In addition, some organizations seek to schedule meetings in such a way as to limit the amount of walking advocates must do to get between offices and between chambers. Consider scheduling meetings for one chamber in the morning and the other for the afternoon, where possible.
- Details on the policy ask: This information helps the policymaker's office direct the request to the appropriate staff person, where necessary. Again, many offices will not schedule meetings without this information.

Although this varies by state, meeting request letters should start going out approximately four to six weeks before the event.

Step Four: Scheduling Meetings

Now comes the hard work of actually scheduling the meetings. In most cases, no more than ten to twenty percent of offices will respond to the initial request, meaning that those who are scheduling the meetings will need to reach out through phone calls and e-mails daily until all meetings are scheduled.

Some of the key questions include:

- Can you set up meetings with staff? In general, setting up meetings directly with staff can be easier than setting up meetings with the legislators.
- Do you have all the correct information? For example, it's critical that you have the correct address for the advocates at this stage of the process. Otherwise, meetings will be scheduled with the wrong offices and will need to be changed when advocates arrive in town.
- What logistics should be considered for the meetings? How long does it take to get in between legislator's offices? How will this impact the number of meetings that can be scheduled during the timeframe? Are there mobility concerns that need to be addressed?

Step Five: Scheduling Other Advocacy day Activities

In addition to meetings with legislators, you'll need to schedule a few key events specifically oriented toward preparing advocates for their meetings, such as:

- Advocate Policy Briefing: Advocates will need a full briefing on the issues they'll be talking to policymakers about. While they don't need to be experts on the issue, they should be prepared to answer basic questions about how these issues impact them personally.
- Advocate Process Training: Advocates also need to be fully briefed on what to expect in a advocacy day meeting. This training should include insights into the day-to-day operations of a policymaker's office and the role of advocates in creating change. In addition, participants should have an opportunity to practice asking for something specific, developing a personalized message and role-playing their meetings so they can be fully prepared.
- Coordinating Messages: Finally, advocates should be given an opportunity to meet with others from their region to coordinate messages, particularly when multiple people will be going to the same meetings. This gives advocates the opportunity to identify who has the most compelling message and who feels most comfortable with the policy asks.

Other potential events might include:

- Opening or closing reception, including a possibility of a reception with policymakers
- Advocate awards dinner or policymaker dinner
- Informative briefings on other non-policy or professional development issues
- Museum or monument tour
- Free time to enjoy highlights of the capitol (whether state-based or federal)

Step Six: Reporting / Materials

Any successful advocacy day requires reports and materials, both for advocates and those leading the effort. The following resources are essential.

- Materials for Advocates: Advocates need the following materials to be most effective in communicating the issues:
  - One-pagers for their use in learning about the issues
  - One-pagers/folders to leave behind with policymakers
  - Capitol map
  - Their meeting schedule, including details on other advocates that will be part of their meeting
  - Information on legislators, including biographical information and, as possible, detailed information on where the legislator stands on your issues.
  - Meeting feedback forms, to provide you with detailed information on what happened in the meeting and steps that need to be taken for follow-up.
  - Checklists for follow-up steps, including sending thank you notes, connecting through social media, setting up a site visit and the like.
- Advocate Leader Materials: Depending on the scope of your event, any or all of the following reports and master schedules will help increase your effectiveness.
  - Master list of registrants and addresses they submitted: This information will help manage any last minute registration questions.
  - Master schedule by state: This schedule can be used to quickly and easily identify which advocates are attending which meetings

- Master schedule by member: This schedule can be used to make determinations about which meetings government relations staff, leadership or lobbyists for you should attend
- Master schedule by time: This schedule will help staff make determinations about which meetings it will be possible for them to attend. In addition, this schedule can help staff "track down" individual advocates or leaders based on what offices they may be in at a given time.
- Meeting with member vs. with staff: This schedule can be used to provide the photographer or press staff with a list of meetings at which an elected official is most likely to appear.

Step Seven: Getting Information to / Coordinating with Advocates

In most cases, you'll need to have staff onsite to help advocates understand their schedules as well as the materials they'll be sharing with legislators. Following are some tips and techniques for successfully staffing a advocacy day event:

- Schedule Pick-Up: Coordinate pick-up for advocacy day in concert with general registration to reduce advocate confusion.
- Be Prepared for Last-Minute Changes: You should be ready with the lobby schedule database on laptop, printer and internet connection (for last-minute registrations and questions about meetings)
- Posting Last-Minute Changes: Ask the venue managers for a flip chart or other public message board to post day-before and day-of meeting changes. Post changes, cancellations and new meetings in different colors to provide advocates with a quick and easy way to update their schedules.
- Managing Cancellations: You should monitor schedule pick-up to determine whether there are individuals who registered ahead of time, but were unable to attend at the last minute. Because meetings were scheduled for these individuals, it may be necessary to call offices to cancel. In some cases, meetings will be scheduled for multiple advocates, so it is incumbent on you to determine whether someone will be attending the scheduled meeting, even if everyone was not able to attend. Letting the policymaker's office know ahead of time that the advocate will not be arriving will help establish good will for the future.
- Mitigating Drop-Offs and No-Shows: In some cases, advocates may simply decide not to attend a advocacy day event, even if they have registered ahead of time. This is especially frustrating when great effort has gone in to scheduling meetings for that advocate. To mitigate this

problem, you can consider asking registrants to sign off on a statement upon registration expressing their understanding that meetings are being scheduled for them. In addition, it can be helpful to keep them "in-the-loop" at every step of the process (e.g., by cc'ing them on scheduling e-mails), so they are aware of the effort being expended on their behalf. Finally, posting a schedule of both meetings requested as well as those that have been scheduled can help make clear what is being planned (although there are downsides to this approach, as noted above).

Step Eight: Creating Cohesion

Finally, you should look for opportunities to create cohesion and momentum around the event. Advocates relish opportunities to share their experiences, either through an in-person follow-up briefing or through online tools. Some options to consider include:

- Facilitated post-meeting briefing / happy hour that offers advocates the opportunity to report on meetings, ask for follow-up advice or celebrate success
- Social networking strategies for advocates to use throughout the day, including a specific hashtag for Twitter; and instructions on posting photos of the meetings to Facebook
- Advocacy day blog to post updates on sessions and meetings
- Youtube, podcast or audio file sharing site to share interviews with advocates, particularly leaders, as a means of encouraging others to attend.