

Meeting Roles Worksheet

One of the best ways to have your legislator meeting run smoothly is to assign roles and responsibilities to each attendee. Speaking in front of legislators may be new and a bit intimidating for some advocates, and knowing which part of the message you're responsible for can ease some of the anxiety of an advocate. Additionally, with a short time frame to communicate an important message, you don't want any awkward silences, talking over each other, or missed talking points.

Role	Qualities of Role Owner	Responsibilities in Meeting
Host	This should be the person who scheduled the meeting and knows each of the participants, including the legislative staff they coordinated with.	This person kicks off the meeting and makes sure the team moves through the agenda on time.
Storytellers	Two advocates who have compelling stories on the impact of the policy on their lives. Ideally they come from two different communities within your advocate network i.e. a patient and a doctor of a disease advocacy group.	They will tell a 2-3 minute story of who they are, how they've been impacted by the issue at hand, and how the desired change (i.e. bill passed or not passed) would create an impact on their life.
Issue Experts	This person is either a grasstops/ super advocate who is deeply knowledgeable on the specifics of the policy or is a staff member from your organization who is supporting the meeting.	This person is most responsible for answering questions. Stories from advocates are the most powerful part of the meeting so will take up most of the agenda, but you want to be able to respond to questions or feedback on the ins and outs of policy.
Social Media Owner	This may be an advocate who is excited to participate but more shy and less comfortable speaking up in the meeting. This could also be the host in a smaller group.	They will coordinate a photo at the beginning or end of the meeting and make sure that it is shared with the organization to distribute on their channels.
Note Taker	Similar to social media, this may be someone who is less comfortable talking in the group. In a smaller group, the host or issue expert could also play this role.	This person is taking down the most important discussion points, points of conflict with the legislator, questions from the office that the group wasn't able to answer, or other follow up.

To use this yourself, you might create the following version to include in advocate packets for the day of the meeting:

Role	Name(s)
All Participants	Alan, Ben, Charisse, Deepthi, Francois
Host	Charisse
Storyteller(s)	Ben, Deepthi
Issue Expert(s)	Francois
Social Media Owner	Charisse
Note Taker	Alan

Meeting Agenda Template

You likely only have about 15 minutes with a legislator when you meet with them on Capitol Hill. With that short amount of time, you need to have an organized agenda to make sure you achieve all of your goals. Here's a template you can use to share with advocates ahead of the meeting:

Time (10 Minutes)	Topic
2 Minutes	Introductions of each person in the meeting from your group
2 Minutes	Explain the ask: What is the bill or budget request you're discussing and what is the action you need from the legislator (sponsorship, vote, public statement, etc.)
6 Minutes	Constituent stories from attendees (2-3 minutes each) <ul style="list-style-type: none"> • First story: NAME • Second story: NAME
4 Minutes	Questions from the legislator or staff
1 Minute	Thank you + photo

As we all know, when legislators are scheduling meetings back-to-back-to-back, sometimes they may be running late and your 15 minute meeting is suddenly 10 minutes. What do you do, what do you cut? Here's a 10-minute version of the agenda:

Time (15 Minutes)	Topic
2 Minutes	Introductions of each person in the meeting from your group
2 Minutes 1 Minute	<p>This can be cut to one minute if your leave-behind is clear and succinct. Tell the legislator that you'd like to prioritize sharing stories about how the policy impacts their constituents, but they can read more about the policy in the weeds in your leave-behind.</p> <p>Explain the ask: What is the bill or budget request you're discussing and what is the action you need from the legislator (sponsorship, vote, public statement, etc.)</p>
6 Minutes 4 Minutes	<p>Constituent stories from attendees (2-3 minutes each)</p> <ul style="list-style-type: none"> • First story: NAME • Second story: NAME <p><i>As much as possible you want to keep this section intact. The stories are what will stick in the legislator's mind.</i></p>
4 Minutes 2 Minutes	<p>Questions from the legislator or staff</p> <p><i>If you have to cut this section short, make sure to reiterate the point of contact who can answer additional questions. Then, advocates can flag in their post-meeting survey that this section was cut short so the lobbying team can make this office a priority for follow up.</i></p>
1 Minute	<p>Thank you + photo</p> <p><i>Do whatever possible to keep the photo in the agenda as it creates an opportunity to re-engage the office and be top of mind again when you share the photo on social and tag the office.</i></p>

Advocate Storytelling Template

The story is the most impactful part of the Hill Day meeting. While you can write your asks of a legislator in an email or lobbying meeting, the story is most impactful face-to-face. And while your advocates are intimately familiar with their personal experiences, there's still coaching you can provide to make sure the story accomplishes its goals. Consistently using the same structure will also help legislators and their staff best remember the key points.

Here are a few key points to include in your story if you're seeking a new bill or legislative action.

Phase of the Story	Goal
Introduction	Tell who you are and the role you play in the story.
Status Quo	<p>Describe the challenges of how life is now without legislative action or the positives of life now based on the current set of laws in place for your industry.</p> <p>If you're familiar with fairy tales, this would be the "Once upon a time" introduction where you describe your day-to-day as things stand now.</p>
Desired Change	Reiterate the action you want the legislator to take in order to support the end goal — sponsor the bill, vote a certain way. This desired action would trigger a chain reaction of events.
New Status Quo with Desired Change in Action	Tell the positives or negatives you would experience if this bill were enacted. How would life change for the better or worse?

The major difference to note is if you're looking to change existing policies or protect the status quo from negative legislation. If your goal is to introduce new positive legislation or receive additional funding, you'll want to start the story with challenges and end the story with the expected improvements, whereas if you're trying to kill a bill you'll start with the positives of the status quo and end with the hypothetical harm your advocate could experience.