**Citizen Legislative Visits**

**Planning & Note-Taking Worksheet**

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| **How to use this worksheet:**1. Save a copy to your computer
2. Use the prompts to plan your meeting & fill in the tables below
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| **How to Schedule a Legislative meeting** |
| **Who will attend?** A group of 4-6 people is often ideal. Be strategic. The group will ideally represent a wide range of constituents (teacher, businesswoman, Minister, etc.). Everyone attending the meeting needs to be in agreement about the policy issue you will be discussing with the elected or appointed leader.  |
| **Meeting Date, Time and Location** * Among yourselves, come up with several proposed dates and times that work for the group. 30-minute meetings are ideal.
* Choose a location in your community. If appropriate, invite the legislator to a tour of your facility followed by a conversation with your group.
* While the legislature is in session, legislators are usually in the home community on Monday mornings, Fridays, and weekends.
* Tuesday-Thursday meetings at the General Assembly in Raleigh require you all to travel, are very short, and can get cancelled at the last minute due to changing legislative calendars.
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| **Request the Meeting**1. **Call the Legislative Assistant to request the meeting** (this usually means leaving a voicemail).

**Here’s a script you can follow:** “Hello, my name is \_\_\_ and I’m with (*name of your organization*) in (*name of county*). I am calling to request a meeting with (*elected leaders’ name*) to discuss (*specific issue*). We have a small group of constituents who are interested in meeting with the Representative/Senator. Our group has some potential times that would work for us. Would any of these times work for the Representative/Senator?” *Then share the proposed meeting dates / times and location.* * *If yes:* “Thank you so much for setting up this meeting. We are really looking forward to it.”
* *Or* “I will follow up this message with an email. Thank you so much for considering our request.”
1. **Email the request as well.** Find the North Carolina legislative directory [here](https://www.ncleg.gov/About/ContactInfo).
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| **Confirm the Meeting*** Once the meeting time is set, re-confirm with everyone in your group.
* Call the legislative assistant a day or two in advance to confirm with the legislator as well.

*If you are having trouble getting a commitment from the legislator to set a meeting, get someone else in your group to make the contact with the same request. Hopefully, eventually someone will be successful!* |
| **Prepare for the Meeting with your group** |
| **Who are you meeting with?** List the legislator by full name and title, as well as any interns or legislative assistants who join the meeting. |
| **What is the issue you will be discussing in the meeting?** |
| **What do you know about the legislator’s interests/concerns regarding the issue you will be discussing?** |
| **What is the purpose of the meeting?** *Example: Ask legislator to sponsor Senate Bill 322.* |
| **What is the main message you want to convey?*** *Message example: Time is running out to act to prevent XYZ problem. Thousands of families in your district will directly benefit.*
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| **During the Meeting** |
| **Agenda Item** | **Time** | **Point Person** | **Notes** |
| Introduce each attendee. Note that they are a constituent in the district and how their background/expertise/job connects them to the issue at hand. | 2 mins | *List out who is leading each of these agenda items as you plan the meeting.* | Keep it very short & sweet. Legislators can get you off track & burn up all your time making new friends. |
| Confirm the legislator’s time availability and purpose of visit. | 1 min |  |  |
| **Issue**: State the main problem and your proposed solution succinctly. Rely on your main message. | 5 mins |  | Focus specifically on the solution/action at hand, *not others.*  |
| **Explore Concerns:** What are the legislator’s main concerns with this issue? What questions does he/she have?  | 5 mins |  | Take careful notes so that you can follow up with answers to her/his questions afterwards. You may also be hearing the opposition’s talking points – note these carefully as well. |
| **The Ask**: Be specific! *Example: Will you sponsor SB 322?*  | 1 min |  | DO NOT SKIP THIS STEP! Wait for an answer. |
| **Support/Opposition**Do you know of any organized opposition to this bill? Share that information.Who else supports this bill? Share also. | 2 mins |  | This is an important courtesy. Legislators will ask this question, so be prepared. |
| **Recap meeting and confirm actions.*** If they made commitments to do anything, reiterate those now. Be sure to note any followup items you’ll need to perform.
* Leave them with business cards or other contact info.
 | 2 mins |  | Take careful notes for followup. |
| **Thanks & photo op** | 1 min |  | Appreciate the legislator for her/his time & service. Take a quick photo together if they are willing. Post it on social media afterwards with a thank you! |
| **After the meeting – Debrief and follow up** |
| Confirm what everyone heard in the meeting. |  |
| Feedback on each person’s role and how the meeting went. |  |
| Confirm who will complete each followup step and by when.  |  |
| Send the legislator a thank you card, note, email, tweet, etc. If you took a photo, use it!  | Saying thanks promptly on social media is a great way to thank the legislator publicly, while also getting in another plug for your issue.*Example: Thank you Rep @JSmithNC for meeting with @Kids4EverNewHanover today! Grateful for the chance to discuss #PaidFamilyLeave with you.*  |