**7 Steps to a Successful Advocacy Meeting**

**Background**

Advocacy is the act of informing your local, state or U.S. Representative or Senator to let them know what issues are important to your organization/community and what problem you want them to help solve.

Meetings will often take place with a staff member rather than the actual elected official. Meeting with a staffer who handles an issue on a daily basis is important to laying the foundation for your cause. Do not expect to get concrete commitments from staff or the elected official during your initial visit. Your goal is to educate them and it is their responsibility to listen and make informed decisions.

Before your meeting, it is very important to research the offical’s biography, voting record, committee assignments and relevant legislation they have supported.

**Meeting Roles**

Before your meeting, select which members of your delegation will serve in the following roles:

* **The Facilitator/Leader** helps ensure that the agenda is on track and that everyone who needs to speak has the opportunity to do so during the meeting.
* **The Presenter/Testimonial** is responsible for articulating specific issues you would like your Representative or Senator to address. It is also important to share personal testimonies (likely from a student) of how an issue directly impacts particular individuals. You can have multiple presenters and testimonies.
* **The Note taker** is responsible for recording all of the questions that were asked during the meeting. The note taker is also responsible for recording any commitments or follow up requests made during the meeting.

1. **Schedule and Confirm Your Meeting** **in Advance** – Reach out to your Representative or Senator’s office to schedule a meeting **at least two or three weeks ahead of time.** For federal offices, contact information is located on their Congressional website. You may call their office to ask for the contact information of the scheduler (if you want to meet with the Representative or Senator) or the staffer who covers the issue you would like to discuss. If you are not certain about who your Representative is, you can enter your zip code by going to: <https://www.house.gov/representatives/find-your-representative>
2. **Identify Yourself** – At your meeting, say your name, the organization you represent, and how many members you have or students you serve. This is also the opportunity to uplift your organization’s work. Allow each member of your delegation to introduce themselves and keep it brief.
3. **Be Prepared to Control the Meeting** – Remember, it’s your meeting. Don’t let the official/staffer get you off track from your agenda. The facilitator should know who speaks, when, and what points should be covered by whom. You may have anywhere between 15 to 45 minutes to present your issues. Be efficient and prepared with talking points.
4. **State Your Position Clearly** – Once you have introduced your delegation, explain the reason for your meeting. Present your position on the issue(s) you would like to discuss. Use clear arguments, data to back up your position, and testimonies whenever possible. Do not be intimidated by not knowing all facts and figures. You don’t have to be an expert to be an advocate.
5. **Make a Specific Ask** – It is important that you are prepared enough to ask the correct questions. Make sure you take notes on what they say, commitments they make, and where they stand. You want to report this back to your organization. Take good notes.
6. **Provide Information** – Always try to leave a “one page” informational sheet. This gives the official/staffer reference material. During the meeting, be as informative as possible, but never speculate or guess about the facts. If you don’t know the answer to a question, say so. If it is something you can find out, promise to do so as soon as possible. If you are unable to find the answer, propose to work with the official/staffer to find out.
7. **Follow Up** – After a meeting, **ALWAYS** follow up with an email restating your position and thanking the office for their time. Also, include any information that you have committed to follow up on during the meeting. After you follow up, think of ways you can continue to build a relationship; consider inviting the official or staffer to an event or speaking engagement.

Sample Script/Email Template

Hello, my name is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. I represent \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (DFS Chapter and/or Organization). We serve \_\_\_\_ (number of students) students each year through \_\_\_ (amount of awards given) scholarships.

I am/we are meeting with you today to discuss the issue of scholarship displacement.

* Currently, students put in a great deal of work to earn scholarships hoping that bringing in additional aid would reduce work and loan burdens.
* Institutional aid or other grants are often reduced by an amount equivalent to a scholarship that a student earns, leaving the student with a zero net-benefit.
* This displacement discourages students from seeking additional scholarships, and disrupts the mission of scholarship providers to make college more affordable and reduce unmet need.
* Ending scholarship displacement is critical especially when the national average for unmet need is about $10,000.

I/we encourage you to reach out to Scholarship America’s director of policy, Kalwis Lo, to learn more information about the issue. His email is [klo@scholarshipamerica.org](mailto:klo@scholarshipamerica.org). He would be more than happy to work with you to address this issue and answer any questions you may have.

Thank you for your time.