

ADVOCATE MEETING CHECKLIST

Concept Maturity



Source:

Member Interview

CONCEPT DESCRIPTION

Organization distributes to advocates a short checklist of activities that advocates are expected to complete before, during, and after their scheduled meetings with policymakers and staff. The checklist signals to advocates the importance of often overlooked or forgotten steps in advance of the meeting, and then arms advocates with a tool that, in-the-moment, gently reminds them in plain, direct terms what preparation, execution, and follow-through is expected of them.

KEY COMPONENTS

- **Standardized meeting expectations captured in a simple, one-page tool:** A codified list of activities communicated in a concise, clear tool increases the likelihood that advocates will understand what is expected and perform each step.
- **Specific actions that can be objectively completed:** Limiting checklist items to only things that can clearly be done by advocates—such as making an ask or sending a thank you note—eliminates confusion, upholds the checklist’s value.
- **Elevate often forgotten tasks before and after the meeting itself:** Division of checklist by steps before, during, and after the meeting accentuates the importance of strong preparation and follow-through, increasing compliance for both.

Sample Advocate Meeting Checklist

Before Advocacy Meeting:

- Read Advocacy Packet (2-4 weeks before)
- Identify and practice story (2-3 weeks before)
- Learn your policymaker’s policy position (1-2 days before)
- Review recent news (1-2 days before)

During Advocacy Meeting:

- Explain impact of policy issue through personal story
- State the policy ask and wait for concrete response
- Write down questions and policy positions stated
- Leave behind relevant printed materials

After Advocacy Meeting:

- Submit meeting report (same day)
- Share experience on social media (same day)
- Write thank you note (1-5 days after)
- Schedule follow-up meeting in district (4-6 weeks after)

CASE FOR CONSIDERATION

Chief Benefit: Tactic improves the quality of advocate-policymaker meetings by ensuring that all advocates have a standard understanding of exactly what is expected of them, and specifically, an unambiguous pathway to a successful interaction.

Additional Benefits: Tactic not only signals what is important but also what is not important, focusing advocates on critical actions to take, and through their absence, dissuading them from devoting time to non-essential items.

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