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AGING POLICY & ADVOCACY SUMMIT

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Virtual Hill Visits 101

The big difference between in-person and virtual lobby visits is technology—or how your visit will take place. Some legislative offices are happy to join video conference calls (e.g., Zoom), some prefer to dial in to non-video conference calls and others will provide their own technology or call-in information.

I. SCHEDULING

No matter the platform being used, the process of arranging a virtual Hill visit is nearly identical to setting up an in-person meeting.

****SENATE VISITS: Advocates in each state should work closely together to prepare for a virtual Hill visit with your Senators. Decide who should be the point of contact for the meeting request and how best you can communicate with each other once a visit is scheduled.***

1. Find the [phone number](#) for your lawmaker and give them a call. State your name, affiliation and that you are a constituent requesting a meeting. Ask to whom the meeting request email should be sent, which is typically the scheduler.
2. Email your request.

Sample Email to Request a Virtual Lobby Visit

Dear [Name],

My name is [name] and I am a [agency/program] advocate and constituent of [MEMBER X]. I would like to request a virtual appointment with the [MEMBER] on [date and time] to discuss [issue(s)]. If the [SENATOR or REPRESENTATIVE] is unavailable, I would like to meet with the appropriate staff member who covers this issue. I can provide a Zoom link or conference call line for this meeting; please let me know what technology your office prefers. I expect to be joined by [X] colleagues and will provide a full list of attendees in advance. Please feel free to contact me at [phone number and email] should you have any questions.

Thank you,
[Name]
[Title and Agency/Program]
[Email Address]
[Phone Number]

3. Confirm the date/time of meeting and include a list of attendees (include name, title, agency/affiliation, city) in the virtual invitation.

II. MEETING

Virtual meetings are similar to in-person visits! If you have a large group, designate just a few people to speak following introductions. **Do not be discouraged if you are meeting with staff and not the lawmaker.** Staff are the Members' most-trusted advisors on the issues you care about. Barring a personal relationship with your Member, staff are the bridge to your success as an advocate and instrumental in developing and maintaining a strong relationship with your elected official.

1. Research your legislator's history on issues or relevant bills.
2. Practice what you will say and assign roles if in a group.
3. Plan to discuss three or fewer "asks."
4. Start the meeting with introductions including name and organization for each attendee.
5. Thank the lawmaker for something (a vote or action in the community).
6. After introduction, talk about the issue you came to address and make "the ask." Make sure to share **personal examples** in your/their community coupled with hard data when possible.
7. Listen to lawmakers and note any follow-up questions or materials they may need. **Remember, you don't need to have all the answers! If you don't know an answer to a question, tell them you will get back to them.**
8. **DON'T** argue; talk about politics or candidates; make-up a response to a question; be led off topic; or be intimidated.
9. **DO** Enjoy the conversation. You are building a relationship and developing an opportunity to be a valued community resource to your elected official and his/her office.
10. Thank the lawmaker and their staff for taking the time to have a meeting with you and note that you will follow up with any materials discussed during the meeting.

III. FOLLOW-UP

Within a few days of the visit, send a thank-you email to all staff with whom you met. Remember to include any information they may have requested or you promised. If you visited with a group, make sure you debrief and identify the individual that will send a collective thank-you on behalf of the group.

STAY IN TOUCH WITH THE STAFF YOU MET! Reach out at least once a quarter with interesting news or other information the Member and his/her office might appreciate learning about in their community.