Meeting with a policymakers, such as a community board member, congressional Representative or Senator is a great advocacy opportunity. You can use meetings to share your story, explain why an issue is important to you and your community, and ask questions directly.

If you are focused on working with legislators and their staff to propose, support, oppose, or make any other move in relation to a piece of legislation, that form of advocacy is called lobbying. Most of the tips and tools in all of Public Knowledge’s resource materials are applicable to lobbying and targeted at improving lobbying efforts for public interest.

As a public interest advocate, it is important to understand the laws surrounding lobbying as a non-profit, especially 501(c)(3) non-profits. In general, 501(c)(3) organizations that have a tax exempt status are prohibited from engaging in “substantial” lobbying. For an in depth look at the laws that apply to lobbying as a charitable organization and tax exemption, please visit the IRS website: http://www.irs.gov/Charities-Non-Profits/Lobbying. Here are some key tips to know if you or your organization decides to engage in lobbying:

>>> GRASSROOTS LOBBYING VS. DIRECT LOBBYING

Direct lobbying is the act of trying to influence a legislation through direct contact and communication with legislators, their staff, and others who influence the creation of legislation. Grassroots lobbying is the act of stating your position to the public and asking them to contact their legislators, legislative staff, and those who influence the creation of legislation on behalf of that position. Distinguishing between the two is important for maintaining certain tax statuses.

>>> RESEARCHING WHICH OFFICES TO MEET WITH IS HALF THE BATTLE

As an advocate, you are most effective when you meeting with the Member of Congress who represents the area where you live or where your organization is located. Congressional websites like www.house.gov and www.senate.gov can provide you with useful tools to lookup the Member of Congress represents you or your organization. Once you have identified your Congressional representative, call or email the congressional office to request a meeting with the Member and the appropriate staffer.

>>> DON’T BE DISUADED IF YOU MEET WITH STAFFERS

Do not be dissuaded if you meet with a member of the Senator/Representative’s staff instead of the actual Member of Congress. These staffers are accustomed to taking meetings and then relaying important information to the Member.

>>> FLEXIBILITY IS KEY

To learn more about the laws and regulations on lobbying for the public interest, please visit the Center for Lobbying in the Public Interest:

http://www.clpi.org/the-law
Be flexible with the dates and times you suggest when submitting a meeting request. **Half an hour** is generally a good amount of time to budget for a meeting.

>>> RECRUIT OTHER PEOPLE FROM YOUR COMMUNITY TO JOIN YOU

There is strength in numbers, and the size of a group can highlight how many people an in area care deeply about an issue. (Be sure to let the office know how many people to expect.)

>>> PREPARE AND REHEARSE

Before the meeting, outline and rehearse what you and your team plan to say. Narrow your presentation down to the **top 3 or 5 points** you want your policymaker to take away from the meeting.

>>> BRING MATERIALS

Be sure to bring materials relevant to the issue that you can leave with the office. See the next page for more guidance.

>>> FOLLOW UP

After the meeting, follow up with a **thank you note and any additional information** that the office may have requested.

>>> PAY ATTENTION TO SENATE PROCEDURES FOR AMENDMENT STRATEGY

>>> BE COGNISANT OF SPENDING TOO MUCH TIME ON BILLS THAT MAY GO NOWHERE

>>> USE [WWW.GOVTRACK.US](http://WWW.GOVTRACK.US) TO TRACK BILLS AND RESOLUTIONS

---

>>> TIPS ON CREATING A LEGISLATIVE ONE PAGER <<<

**What is the story you are telling?**

- A short, one-page summary (or “one-pager”) is an example of a briefing material that can help you explain an issue or position that you or your organization has taken.
- After deciding which story you want to tell, think of the helpful facts that support your position.
- This can include background information, helpful statistics or figures, or highlight stories from your community.

**Know your audience.**

- Including information that is specific to the office you are meeting with can be helpful way to stand out. For instance, highlighting how many people in a certain state or district will be affected by a policy can be an effective way to make sure your message is received.
- If the meeting is about a specific problem, be sure to include what solution or what specific action you believe a policy maker should take.
- If you are representing a large group or organization, or if you are working with limited resources, it is important to create something that many people can use so that you are sharing a common message.

**Don’t forget the details!**

- Use your peers! The best way to know if you have created something that is interesting and helpful is to have an extra pair of eyes review it. Try sharing it with someone who is unfamiliar with the issue to gather some feedback.
- Double check for spelling and typo errors. A document filled with errors is distracting and affects how others perceive your organization and mission.
- Is the font size and style easy to read? It is always best to choose something generic that will not distract from your message.
• Did you include your organization’s logo and contact information? Make sure the person you are sharing this resource with knows how to connect with you