CAPITOL DAY MEETING GUIDE

First and foremost, legislators **want and need** to hear from you. They **want** to hear from you because they want to win your support and to keep a good rapport with their constituents. They **need** to hear from you because Austin during the legislative session can be a vacuum; it is your place to provide a boots-on-the-ground perspective they may be lacking. You are the expert on your issue, and can offer a unique standpoint and context. **Follow these 5 simple steps to schedule a meeting with your legislator(s), or their staff.**

1. Find Your Office
To find who represents you by address, zip code, city, or county, visit the search page of the Texas Legislature.

2. Know Your Content
When calling the office to schedule an appointment, you may be asked what the topic of discussion will be for the meeting. You can be brief and say that you are meeting with office to take part in advocacy related to United Way system-wide goals in education, financial stability, health, the nonprofit sector.

As you prepare for the virtual meetings, remember that your unique value-add is that you offer a local perspective and you are an expert on the community. Be sure to start collecting stories or brush up on your community impact statistics before going into your meeting.

3. Make the Call
Place a call to your legislator's office using the phone number provided on the website, and ask to **speak to the scheduler**.

4. Let the Office Know You're a Constituent
When connected with the appropriate staff for scheduling an appointment, lead with the fact that **you are from the area United Way.** Follow with the framing you decided in Step # 2.

The staff that you speak with will instruct you on the process their office uses to schedule meetings.

Request a virtual meeting with the member, but don't dismiss the importance of being scheduled with key staff. Staff are critical players so any "face-to-face" is good opportunity for relationship building and education.

5. Follow-Up
A few days before your meeting, contact the office to **confirm the time, virtual meeting/conference call details, and list of attendees**. Be sure to make '*The Ask'* during your meeting, and follow-up with staff about any questions they may have during your discussion.

Preparing for Your Meetings

For additional support on visits, please reach out to Ashley.harris@uwtexas.org .
The UWT team wants to support you as you prepare!

Goals for the Legislative Visits During the Capitol Day
- Build or strengthen relationships with members of the Legislature
- Position United Way as an expert on the community and partner for the member
- *Remind policymakers of our collective priorities as a network of community voices as outlined on UWT's* 2021 Public Policy Agenda

Sample Meeting Agenda
Note: If you are with a group, meet outside the office to discuss each person's role and talking points for the meeting.
1. Introduce yourself, share connections, ask about staff
2. Texas United Way network & context of visit
3. Your United Way: lift-up 1-2 local/state highlights
4. Transition to key messages on the top (2-3) issues/priorities outlined in the 2021 Public Policy Agenda
5. Ask for member's support on our collective priorities
6. Offer to be a resource and thank them!

Expectations
- Most meetings will last 20-30 minutes
- Even if scheduled with the member, you may meet with staff or member might join halfway through the meeting (STAFF ARE IMPORTANT!)
- Screenshots of virtual meetings are important– **snap a photo of your screen or take a screen shot**
- Dress is business professional

After Your Visits
- Take a moment to share your visits on social media –tag your members! They love the press.
  - Use your post to reinforce the ask you shared.
  - Use Hashtags: #TexasUnited and #UWAdvocate
- ***Immediately capture important notes and relay the information to United Ways of Texas so we can be sure to learn from your insights.***
- Send thanks & follow-up to the offices