

Virtual Lobby Visits 101

A federal lobby day typically means going to Capitol Hill, travelling between office buildings, and ultimately meeting in-person with congressional staff or even your members of Congress. Unfortunately, given COVID-19, we can't plan traditional lobby visits. But that doesn't mean we can't make our voices heard! This overview has all the information you need to plan a successful virtual lobby visit on any issue.

On the following pages you will find:

- How to [schedule](#), [prepare for](#), [hold](#), and [follow-up](#) after a virtual lobby visit.
- Two-page "[Tips to Have a Successful Virtual Lobby Visit](#)" to print.

As soon as you set up a virtual lobby visit, [fill out this form](#) to let NCJW, Inc. staff know! It helps us plan our national advocacy strategy,

In addition to reviewing this resource to prepare for your meeting, watch NCJW's "[How to Have a Successful Advocacy Visit](#)" webinar and find more advocacy materials — including those needed to plan your own training on the topic — on [NCJW's website](#).

Schedule a Virtual Lobby Visit

State Policy Advocates (SPAs), Section Presidents, VPs of Advocacy, and/or Executive Directors in each state should work closely together to prepare for a digital lobby visit. Coordinate who should request a meeting and how best to communicate with each other once a visit is scheduled. A virtual meeting has the advantage of greater accessibility for leaders and advocates, since there is no travel required.

The process to set up a virtual lobby visit is nearly identical to setting up an in-person meeting. First, [call](#) your lawmaker's office. Explain who you are, what organization you are with (the National Council of Jewish Women — when applicable, include your section name), that you are a constituent, and that you would like to meet with the senator or representative to discuss the issue. Ask to whom the meeting request email should be sent, and get their email address. Then, send a formal email requesting a

meeting with the member of Congress and/or their staff (sample email below). Include in the request how the meeting will take place (i.e. which technology platform) and the topic(s) you would like to cover. If you do not hear back in a few days, send a reminder email or call the office again. You can also use district staff for assistance, especially if there is someone in the office with whom you have a relationship. Remember, if the member of Congress is unavailable, always request to meet with the staff member who works on the issue.

The big difference between an in-person and virtual lobby visit is **technology**, i.e. how the visit will take place. Some offices allow Zoom (video conference call) and some allow a free conference call line; others will provide their own technology or call-in information. A productive meeting can happen regardless of technology, but it is one additional step to iron out when planning a virtual lobby visit.

Options for holding a remote meeting include setting up an account with [freeconferencecall.com](https://www.freeconferencecall.com), [Zoom](https://zoom.us), [Google Hangouts](https://hangouts.google.com), or any platform with which you are familiar. Note: all of these platforms offer free options that will suffice for a lobby visit. Make sure all participants have access to your meeting link or conference line prior to the meeting.

Sample Email to Request a Virtual Lobby Visit

Dear [Name],

My name is [name] and I am a National Council of Jewish Women advocate and a constituent of [Senator X / Representative X]. I would like to request a virtual appointment with the [Senator / Representative] on [date and time] to talk about [issue]. If the [Senator / 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] people.

Please feel free to contact me at [phone number and email] should you have any questions. I look forward to this “virtual” visit!

Thank you,

[Name]

National Council of Jewish Women [Title and Section]

[Email Address]

[Phone Number]

If you successfully schedule a virtual visit weeks in advance, follow up with the office a few days before the meeting to confirm the time and technology you plan to use. Also, if the number of people attending the visit changes over time, keep the staff person informed. Some staff request a list of attendees prior to the meeting.

Prepare for a Virtual Lobby Visit

As soon as you set up a virtual lobby visit, **fill out this form** to let NCJW, Inc. staff **know about your visit**. This information helps us coordinate our national advocacy strategy. Next, work with other leaders in your section and/or state to determine whom you want to invite to the meeting and how to structure the visit. Share issue briefing materials with those attending the meeting. Last, hold a meeting in advance of the visit to decide roles and responsibilities, brainstorm personal stories relevant to the issue, and practice making the ask. The key to a successful lobby visit is preparation!

Tip: You do not need to know all the answers! If asked a question during the meeting you cannot answer, do not make up the answer. Say you will get back to them with the information they need. This keeps your relationship authentic and ongoing.

Hold a Virtual Lobby Visit

Virtual lobby visits have the same components of in-person visits, but can be slightly more challenging because it is more difficult to read body language when not in person.

- Start the meeting with introductions, including name, organization, and pronouns. If a large group of NCJW advocates joins you, designate just a few people to speak

and introduce others by saying, “I am joined by X NCJW advocates from your state/district.”

Tip: Have fun! *You are building relationships and sharing your passions on issues you care about.*

- After introductions, talk about the issue you came to address and make “the ask”, i.e. what you want the lawmaker to do (cosponsor a bill, vote NO, speak out on the House floor, etc.). Consider adding a personal story to drive home why you care about this issue.
- Ask questions and listen to the answers! Hear what your lawmaker or their staff has to say about your ask, and note any follow-up questions or materials they need. It is easier to speak over another person when meeting virtually. Be aware of this tendency and make sure you create space for the member of Congress or staff member to speak. At the end of the meeting, say thank you and reiterate any next steps.

Tip: Focus the conversation on the issue at hand. *The lawmaker or staff may bring up other policy issues or the upcoming election, which can take your meeting off-course or beyond the boundaries of what is [501\(c\)\(3\) compliant](#). Check out this [handy guide](#) for language you can use to pivot the conversation back to your issue.*

Follow Up After a Virtual Lobby Visit

After the visit is over, and the lawmaker and/or staff is off the phone or virtual meeting, hold a quick debrief with your team to discuss what went well, and what you would do differently in the future. Make sure there’s agreement about who is sending a thank you note, and what materials to include.

Within a few days of the lobby visit, send a thank you email to all staff with whom you met that includes any materials discussed or requested during the meeting (sample thank you email below). Advocacy is all about building relationships, so stay in touch with the staffer(s) with whom you met.

Last, tell NCJW, Inc. staff how it went! Send a quick write-up of your visit via email to Faith Williams at fwilliams@ncjw.org. This information helps inform our national advocacy strategy.

Sample Thank You Email

Dear [Names],

Thank you so much for taking the time to meet with us yesterday. During the meeting you asked for additional information on [x]; it is attached to this email. Let me know how else I can be a resource in the future.

We appreciate you following up with the senator on [the ask]. We hope she will be a champion for this issue. (If emailing the lawmaker directly: We appreciate you considering [the ask] and hope you will be a champion for this issue.) Do not hesitate to reach out with any further questions, and I look forward to staying in touch!

Thank you,

[Name]

National Council of Jewish Women [Title and Section]

[Email Address]

[Phone Number]

Tips to Have a Successful Virtual Lobby Visit

The key to a successful lobby visit — be it in-person or virtual — is planning and preparation.

Before the Visit

- Set up an appointment
- Plan to discuss no more than three issues per visit
- Research legislator’s history on the issues and/or relevant bills
- Assign roles for the meeting (see table below)
- Practice both what you plan to say, and the technology you plan to use

During the Visit

- Be flexible — meeting times can change last minute and technology can pose its own hurdles
- Open the visit by introducing NCJW and individuals in the meeting
- Thank the lawmaker for something (vote, action in community, etc.)
- Make “the ask” by stating the issue and the action you want the lawmaker to take
 - Use personal experiences and stories to emphasize why the issue matters
- Offer to be a resource on the issue
- Gather information by asking questions about the issue or bill
- Listen — this is a conversation
- Wrap-up the visit
 - Review comments, commitments, and follow-up requests
 - Thank legislator/staff for their time

After the Visit

- Debrief the visit after the appointment is over. If you are on the phone or an online platform, be sure the lawmaker and/or their staff is no longer a part of your meeting.
 - Discuss positives and constructive feedback. Review all requests for additional information made during the visit; delegate follow-up tasks
- Send a thank you email that restates the ask and includes all requested follow-up materials
- Stay in contact with the staffer or legislator after the meeting to build the relationship

Lobby Visit Roles

These roles are flexible based on the number of people in your group, what topics you plan to cover, and who has stories to contribute.

<p>LEADER: Schedules and confirms meeting time and technology; facilitates group introductions; provides overview of NCJW’s mission and work; ensures the visit stays on message and on track.</p>	<p>ISSUE PRESENTER(S): Delivers issue talking points; shares story/personal experience; makes “the ask;” responds to questions.</p>
<p>RECORDER: Takes notes of any questions, commitments made, or follow-ups requested during the meeting; sends thank you email.</p>	<p>TECHNOLOGY LEAD: Runs the back-end for the technology used during meeting; troubleshoots issues.</p>

Best Practices

A few reminders to keep your visit on-track and successful.

DO:	DON'T
<ul style="list-style-type: none"> ● Prepare roles, asks, and leave-behind materials in advance ● Join the meeting early to leave room to address technical difficulties ● Be flexible ● Say thank you ● Practice time management ● Keep on message and use pivot language to stay on-track ● Use personal stories ● Listen to answers and information shared ● Debrief after the visit ● Stay non-partisan 	<ul style="list-style-type: none"> ● Introduce everyone if there are more than five people; instead, introduce the organization ● Make up a response to a question ● Be led off topic by a fellow advocate, staff member, or legislator ● Argue with your legislator or the staff member — if needed, agree to disagree ● Talk about the election; keep the focus on the issue, not politics or candidates ● Be intimidated — as a constituent, you have every right to be there