

FACILITATOR CHECKLIST

TITLE: Advancing Equity Through Advocacy

MATERIALS NEEDED:

- DVD
- Agenda
- Exercise A Directions (optional)
- Handout for Exercise A (optional)
- Discussion Questions and Resource Guide
- Evaluation

PRESENTATION STRATEGIES:

- Visual learning (DVD)
- Small group work (optional)
- Discussion and brainstorming

BEFORE THE PRESENTATION:

- Insert your name and date into the Evaluation form.
- Review the Two-Minute Activist Issues and Legislation link on AAUW website: <http://capwiz.com/aauw/issues/> for the current legislative issues facing Congress. Under “Current Action Alerts”, choose three of these issues to print out as handouts for the participants to complete Exercise A (optional).
- Make copies of the Discussion Questions, Resource Guide, Handout for Exercise A (optional), Two-Minute Activist Issues and Legislation for Exercise A (optional) and Evaluation.
- Review the facilitator introduction script, DVD, exercise, and discussion questions to familiarize yourself with the content and timing.

HANDOUTS:

- Discussion Guide and Resource Guide
- Handouts for Exercise A (optional)
- Evaluation

TIME REQUIRED:

Approximately 1 Hour (more if include optional Exercise A)

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AGENDA

TITLE: Advancing Equity Through Advocacy		
GOALS: <ul style="list-style-type: none"> • Inform AAUW members of the Public Policy Program components and Legal Advocacy Fund • Demonstrate the strength of AAUW Grassroots Advocacy • Empower AAUW members in their critical role as advocate, both individually and collectively 		
OUTCOMES: <ul style="list-style-type: none"> • AAUW member will have understanding of the Public Policy Program and Legal Advocacy Fund • AAUW member will recognize the strength of AAUW Grassroots Advocacy • AAUW member will be ready to use their advocacy skills in multiple ways on the national, state, and local levels 		
OUTLINE	TIME ALLOTTED	Materials
STEP A: Introductions and review goals	5 min	Agenda
STEP B: Show DVD	15 min	DVD
STEP C: Exercise A (Optional)	30 min	Handouts
STEP D: Show DVD	15 min	DVD
STEP E: Discussion Questions	20 min	Discussion Questions
STEP E: Wrap-up and Evaluations	5 min	Evaluations

EXERCISE DIRECTIONS

TITLE: Advancing Equity Through Advocacy		
EXERCISE A: Meeting with an Elected Official		
EXERCISE DIRECTIONS	TIME ALLOTTED	Materials
<p>STEP A: Introduce the Exercise</p> <p>STEP B: Depending on the size of your full group, ask the group to split into groups of 3-7 individuals, with one person taking the role of facilitator and one person taking the role of recorder for the group.</p> <p>Using the tips and current issues provided in the handouts, instruct the group to prepare an agenda for a meeting with an elected official. Their plan should specify a clear purpose for the meeting by choosing an issue, identify who will make introductions, develop talking points, specify which participant will say which talking point, and determine the ask. Each person at the meeting should have something to say.</p> <p>STEP C: Ask the groups to share with the whole group the agenda they developed, paying close attention to the purpose, talking points, and ask.</p> <p>STEP D: Summarize the session by asking the full group: (1) Has your branch ever held a meeting with an elected official? (2) Did your branch plan an agenda and talking points including a clearly stated purpose for requesting for the meeting? (3) Did you get what you asked for? Speculate as to why or why not. (4) What could you have done differently that would have been more effective?</p> <p>STEP E: Wrap-up of Exercise</p>	<p>15 min</p> <p>5 min</p> <p>10 min</p>	<p>Handouts</p>

Handout: Advancing Equity Through Advocacy

Tips for Meeting with an Elected Official

AAUW members have a long history of lobbying and holding their elected officials accountable for how they vote on AAUW priority issues. Meeting with an elected official is the most effective tool in the activist arsenal. The following tips refer to meeting with a member of Congress, but the tips are relevant to meeting with any elected official.

Visit your members of Congress. All members of Congress have one or more offices in their congressional districts. Most members of Congress regularly return to their districts and hold meetings with their constituents.

Find out who handles scheduling. Use the Elected Officials tab on AAUW's Two-Minute Activist website (<http://capwiz.com/aauw/dbq/officials/>) to find the phone numbers for your congressional representative's in-district offices. Call the office nearest you to ask for the name of the person who handles in-district scheduling requests. If you can speak to the scheduler at that time, go ahead and request a meeting but follow up on the request in writing. Ask for the scheduler's fax number or mailing address.

Put your request in writing. Write a letter requesting a meeting and address it to the scheduler. Be sure to include who will attend the meeting, your AAUW affiliation, which days you are available to meet, and what issues you would like to discuss. If you were able to schedule a meeting over the phone, write to confirm the meeting date and time. It is important to pay attention to developments relevant to the issue you choose. For example, if you request a meeting to ask one of your members of Congress to co-sponsor the PACT Act and in the meantime he or she becomes a co-sponsor, you would more than likely use the meeting to thank the person and talk substantively about an alternative matter. For suggestions of relevant issues to discuss, please contact AAUW's public policy department at VoterEd@aauw.org or 202/785-7793.

Fax it. Fax your request to the person responsible for in-district scheduling. Faxing is a more timely method of delivery than standard mail but still provides a formal hard copy that the scheduler can use for internal purposes.

Confirm the request was received. Wait a few days and call your contact person to confirm receipt of your request. Ask if the member of Congress is available for a meeting, and if not, ask to meet with the district or state director. Keep in mind that it likely will take several follow-up calls to get a meeting scheduled. Don't get discouraged!

Follow up. Call to follow up every few days to see if your meeting has been scheduled.

Confirm the meeting. Once a meeting is scheduled, call the day before to confirm. This also will give you the opportunity to confirm who else will be in attendance.

Preparing for the visit:

- **Decide who will attend the meeting.** Try to bring representatives of different groups with an interest in the legislation.
- **Decide what you want to achieve.** What is it you want your member of Congress to do—vote for or against a bill? Ask for something specific, such as support or opposition to a particular bill.

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- **Gather information.** Learn about your representative's voting records on AAUW issues. Become familiar with the opposition's views and arguments on the issues to help you answer questions.
- **Agree on talking points.** Keep your message simple and to the point.
- **Plan your meeting.** People can get nervous in a meeting, and time is limited. Be sure that you lay out the agenda for the meeting beforehand, including who will start the conversation and who will make key points.
- **Prepare materials to leave with the member of Congress or staff.** Copies of relevant AAUW position papers, the *AAUW Public Policy Program* brochure, the *AAUW Congressional Voting Record*, and a letter or fact sheet summarizing your concerns are good examples.

Find out the latest from Washington, D.C. AAUW members can e-mail AAUW's public policy department at VoterEd@aauw.org or call 202/785-7793 for information on the status of the issue you will be discussing and for assistance with making persuasive arguments in support of AAUW's position.

During the visit:

- **Make introductions** and be clear who is a constituent in the meeting. Members of Congress are most responsive to the people who can keep them in office—their constituents—so always have some constituent representation in any meeting. Make sure to also identify yourselves as AAUW members.
- **Speak about AAUW nationally and locally.**
 - *The American Association of University Women was founded in 1881 and is the nation's leading voice promoting education and equity for women and girls. AAUW has more than 100,000 members, 1,300 branches, and 550 college/university institution partners. AAUW advances equity for women and girls through advocacy, education, and research. Our members examine and take positions on fundamental issues of the day—educational, social, economic, and political. The AAUW Educational Foundation is the world's largest source of funding exclusively for graduate women providing about \$4 million in fellowships, grants, and awards annually.*
 - Speak about your branch and AAUW in your state.
- **Provide brief, clear statements** about the problem and your solution.
- **Personalize your comments and provide local context.** Make a strong connection between the issue and the local community that the member of Congress represents. Use personal stories and local examples to help illustrate why your issue is important.
- **Support your case with facts.** Don't overwhelm with numbers, charts, and data, but do use them judiciously to make your point and legitimize your argument.
- **Stick to your talking points!** Stay on topic and back up your point with no more than five pages of materials that you can leave with your member of Congress.

Member Leader Focus 2008

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Saying “I don’t know” can be a smart political move. You don’t need to be an expert on the topic you are discussing. If you don’t know the answer to a question, tell your member of Congress you’ll find out. This gives you the chance to contact him or her again about the issue.

- **Listen carefully to the responses of your member of Congress.** What is he or she saying about the issue? What is his or her position? What questions or concerns do you need to answer? Pay attention to the direct and indirect statements of support or opposition.
- **Ask for support.** If you don’t directly ask for support of your position, you may never actually find out what your member of Congress intends to do. **THE ASK MUST BE CLEAR.** For example, “Can we count on you to support H.R. 154 when it comes to a vote next week?” After you ask, pause. Let your member of Congress answer and clarify if his or her response is not yet clear. Once you get an answer, you will know if the member of Congress supports you, opposes you, or is undecided.
 - If she supports you, thank her, and thank her again. Be a resource to her. If she needs additional information or help in any way, offer to make that available.
 - If she opposes you, stay cordial and friendly. Even if you disagree on this issue, you may be in agreement on another issue. Keep the door open to working together in the future.
 - If she is undecided, ask if there is additional information she needs on this issue and get it to her in a timely manner. Also think about whose voice it is important for her to hear from on the issue and try to mobilize those constituents yourself.

After the visit:

- Right after the meeting, compare notes with everyone in your group to confirm what your member of Congress committed to do.
- Each person who took part in the meeting should promptly send a personal thank-you letter to remind the member of Congress of anything she or he agreed to do.
- Follow up in a timely fashion with any requested materials and information.
- Share the results of your meetings with your branch, your state public policy chair, and with AAUW public policy staff. Share insights you have gained about the concerns of your member of Congress and ask others to join you on future visits.
- Find out when the member of Congress will be in your home district hosting town hall meetings or forums and organize a group to attend.
- If you have met with a member of Congress, tell AAUW’s Public Policy and Government Relations Department what you learned during your meeting. Please go to <http://capwiz.com/aauw/lrm/feedback.t> and fill out the feedback form or send the Public Policy and Government Relations Department an e-mail at VoterEd@aauw.org. Knowing what arguments your member of Congress used, what issues are important to him or her, and what positions he or she took will help us make our national lobbying strategy more effective!

Send a thank-you note. The best way to recap what happened at the meeting is to send a thank-you letter recounting the issues you discussed and any commitments that were made.