

Advocacy Meeting Planning & Note-Taking Worksheet

This worksheet helps to plan, conduct, and follow up on advocacy meetings with elected or appointed leaders. The chart below includes examples to guide your preparation. Note: A meeting with a representative may not be possible, so be prepared to speak with staff!

How to Schedule an Advocacy Meeting

Topic / Step	Guidelines / Notes	Action Items / Examples	User Notes
Who will attend?	A group of 4–6 people is ideal. Include nonprofit leaders, staff, and community representatives.	Recruit 2 staff, 1 volunteer, 1 board member, and a community ally to join the meeting.	
Meeting Date, Time, and Location	30-minute meetings are ideal. Consider hosting at a community site or nonprofit facility. During session, legislators are home Mondays, Fridays, and weekends.	Select three potential times; choose a local nonprofit office or community center for the meeting.	

Request the Meeting

Step	Instructions	Example	User Notes
Initial Request	Call or email the legislative assistant to request a meeting. If no reply, follow up.	“Hello, my name is Jane with One Sector, One Voice in Guilford County. We’d like to meet with Senator Green to discuss strengthening nonprofit partnerships.”	
Follow Up	Confirm date and time once scheduled. Reconfirm a day or two before.	Send confirmation email: “Thank you for scheduling our meeting for March 18 at 10 AM. Our team looks forward to the discussion.”	

Find legislator contact info at: <https://www.ncleg.gov/Members>



Prepare for the Meeting

Preparation Topic	Guiding Questions	Notes / Example	User Notes
Meeting Participants	Who are you meeting with? Include full names, titles, and staff present.	Example: Rep. Taylor – NC House District 12; Legislative Assistant – Ms. Kelly Brooks.	
Topic / Issue	What specific issue or proposal are you discussing?	Highlight the importance of sustainable funding for nonprofit workforce development.	
Legislator Background	What do you know about their interests or past positions?	Rep. Taylor has supported small business grants and community partnerships.	
Purpose	What is the purpose of the meeting?	Ask legislator to support budget allocations that include nonprofit sector workforce initiatives.	
Key Message	What is the main message?	Nonprofits are key community partners delivering essential services and deserve equitable funding.	

During the Meeting

Although the template is planned for 15 minutes, actual meeting time varies by level of government — with federal meetings offering the least flexibility.

Agenda Item	Time	Notes / Tips	User Notes
Introductions	2 mins	Each attendee shares name, role, and how their work impacts the community.	
Confirm Purpose	1 min	Confirm legislator's time and purpose of meeting before diving into issues.	
State the Issue	5 mins	Explain the challenge nonprofits face and propose a clear solution.	



Explore Concerns	5 mins	Ask for the legislator's thoughts or potential hesitations about the proposal.	
The Ask	1 min	Request specific support, such as signing a budget letter or co-sponsoring a bill.	
Support / Opposition	2 mins	Share known supporters (e.g., United Way, local chambers) and note any opposition.	
Recap & Next Steps	2 mins	Summarize takeaways and confirm who will follow up on next steps.	
Thank & Close	1 min	Thank them for their time; take a photo if appropriate for social media.	

After the Meeting – Debrief and Follow Up

Follow-Up Step	Guidelines	Example or Notes	User Notes
Debrief with Team	Confirm what was discussed and who will handle follow-up responsibilities.	Hold a 15-minute team call to review commitments made during the meeting.	
Assign Tasks	Identify who will complete follow-up actions and by when.	Ex: Alex will send thank-you note; Jordan will email additional policy brief.	
Thank the Legislator	Send a thank-you email or social media post within 24 hours of the meeting.	“Thank you Sen. Green for meeting with @OneSectorOneVoiceTriad to discuss strengthening the NC nonprofit workforce!”	
Track Outcomes	Document meeting outcomes, commitments, and follow-up opportunities.	Log meeting details in advocacy tracking spreadsheet and share updates with OSOV members.	

NOTES: