

CCL Lobby Meeting Plan & Outline

Meeting Plan

This section helps you prepare for the meeting.

OVERVIEW

Member of Congress Name (MOC):

State/District:

Is the meeting with the MOC or staff?

Staffer name and title (even if meeting with the MOC, a staffer will be present):

Liaison (or appointment setter) name, email and cell number:

BUILD YOUR AUDIENCE/MOC PROFILE

- What is your MOC's knowledge of the policy?
- What is their interest or investment?
- What benefit or threat will they face for supporting the policy? (Threats are often more impactful than benefits.)
- Do they already have an opinion on the legislation?
- Are they generally open to new ideas?
- How do they like to be addressed? (Are they more formal, casual, first name, etc.? What is their tone when talking with someone?)
- What historical or cultural factors influence them? (Have they worked on this before, what is the history of that? What is the larger political picture around them?)
- What is their ideology or moral framing? Who do they look to or trust when thinking about this topic? Use these [worksheets](#) to help understand their ideology. Review [BRIDGE training](#) to understand moral framing and other aspects of building a profile.

APPRECIATION AND GOALS

What is your appreciation(s) of the MOC or staffer? It could be for a position they've taken recently, an accomplishment, bipartisan work, etc. Don't feel limited to climate/energy issues.

What is the goal of this meeting? Things to consider:

- 1) What is our relationship like with this office
- 2) What was discussed in previous meetings?

(The meeting lead will have minutes from previous meetings. It is essential we treat them with confidentiality in order to maintain a trusted relationship with the MOC.)

Often the goal is to say “Yes” to our ask, but if this is a new or challenging relationship the goal might be to build trust so they are open to our ask. Sometimes we know something about a member that may cause us to adjust the ask - they don’t do what we are asking (ex. Co-sponsor, participate in negotiations) because of a committee position or other reason. Make sure your goal is something they might do and preferably a bit of a stretch or challenge for them. If the ask seems too easy, think about how they might take the next step.

PRIMARY ASK

What aspects of this bill do you think will resonate most with your MOC?

Consider their ideology and moral framing as well as other aspects of the MOC profile you built above.

As you consider the following in regard to the primary (and secondary) ask, integrate these Motivational Interviewing principles:

- *Ask open-ended questions, aiming to elicit your MOC’s support for any area of climate policy.*
- *Reflect back what you hear the MOC/staffer say, using your own words, emphasizing common ground. Offer at least as many reflections as questions.*
- *Ask permission to share information, then share concisely before asking what they think about what you have shared.*

What are some open-ended questions that could elicit discussion about the ask and help find common ground? For example, “what do you like about this bill?” or “What concerns do you have about this bill?” Anticipate what you think your member’s responses to your open-ended questions and the bill might be. Make some notes about statements and values you can anticipate, and prepare reflections, additional open-ended questions, and acknowledgements of common ground.

SECONDARY ASK

What is the secondary ask prepared by CCL's Government Affairs team? (If more than one option, which do you think will most appeal to your MOC?) If there's time for further discussion, what open-ended questions could you ask to encourage discussion about the ask? What do you anticipate your MOC might say? What are some reflections—emphasizing solutions—that you can prepare ahead of time?

MEETING ROLES

Assign the following meeting roles. Some people will take multiple roles. Read role descriptions [here](#).

- Leader:
- Appreciator:
- Time Monitor:
- Notetaker:
- Asker:
- Deliverer:
- Photographer (ask permission of the MOC/staffer to take a photo):
- Thank you note:
- Follow-up:
- Discussion/listener: all team members

Meeting Outline

This is essentially the meeting agenda. It is meant as a guide. Be prepared to adapt as needed.

Beginning	Middle	End
Introductions (time check)	Discussion/Open-Ended Questions/Reflections	Thanking Them for Meeting
Appreciation	Listen & Learn	Summarize/Determine Follow-Up
Share CCL's Purpose	Secondary Asks	Closing and Photo

Make the Ask		
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1. Introductions

- a. Meeting Lead: Thank the MOC or staffer for meeting with us and facilitate introduction of CCL team members.
 - i. Each person might share their name, hometown, occupation, and one sentence about what inspires their action on climate.
 - ii. When the time monitor introduces themselves they say, “How much time do you have for this meeting? I’ll give a signal when we have 5 minutes left.”
 - iii. The appreciator goes last and makes the **appreciation** after introducing themselves.
 - iv. If appropriate and time permits, one person could share a personal story that may resonate with the MOC or staffer.
- b. Meeting Lead: Ask the staffer to introduce themselves to learn a little about their background.

2. Purpose

- a. Designated team member: Unless you are very familiar with the staffer/MOC, briefly restate our purpose, for example: “Citizens’ Climate Lobby is a nonprofit, nonpartisan, grassroots organization that empowers everyday people to bridge divides and build political will for effective climate solutions in Congress. We are committed to advancing federal policies that reduce emissions, remove climate pollution, and protect people”
- b. Designated team member: Briefly summarize the last meeting with the office.

3. Ask

- a. Asker - “Today we’re here to ask for your support of [insert bill name].” Provide a brief summary of the bill.

4. Discussion/Listen & Learn - includes all team members.

- a. Asker: “Are you familiar with this bill?” If no, “Would you like us to share a little more about the bill now, or do you have some questions first?” If they are familiar, “What are your thoughts about the bill?”
- b. Refer to the open-ended questions you developed as appropriate.
- c. Meeting Lead/Asker: As the discussion winds down, if it’s not clear where the member stands on supporting the bill, ask “When this bill comes up for a vote, will [MOC] support it?”
- d. If it becomes clear they cannot commit to your ask, make sure you clearly understand what holds them back.
- e. Designated volunteer: “What could we be doing more of in the district to make it easier for you to support this policy [or other ask, as appropriate]?”

5. Secondary Ask

- a. Asker: “We also wondered if [MOC NAME] would support [name secondary ask for this meeting, with very brief description.]”
- b. Discussion as time permits.

6. Wrapup

- a. Time Monitor: signals the team when five minutes remain in the meeting.
- b. Designated volunteer: **Thank** them for the meeting. **Summarize** the meeting, highlighting what the MOC/staffer said and any **follow-up** agreements on either side. If the ask is being considered or the ask needs to be shared with the MOC still, ask when we should follow-up with the staffer.
- c. Photographer: With permission, take a group **photo** with the MOC/staffer (or a screen capture if this is a virtual meeting).

Things to do after the meeting:

- The team should debrief after the meeting. If you are in person, immediately have the team members sign a thank you note and have a designated team member walk this back into the office. (Don’t seal the envelope, they may not accept it for security reasons.) If this was a virtual meeting, have the liaison/lobby meeting lead send a thank you note via email from the team.
- Liaison and team will do any research that was requested of them, and liaison will send any follow-up information to the staffer within a couple of weeks.

Things *not* to do:

- Record audio or video of lobby meetings
- Take photos without asking for permission
- Use Zoom or other applications to create a transcript of lobby meetings or allow apps/bots to attend virtual meetings