northern california
college promise coalition

NCCPC Template: Shared Agenda for Legislators

Last modified on February 1, 2022

Objective:

Use this Shared Agenda for Legislators template as a guide with your collaborators to plan **for a meaningful engagement with legislators or elected/appointed officials** and ensure all participants know:

- **WHY** am I here?
- **WHO** am I addressing in this meeting?
- **WHAT** will I contribute?
- **HOW** will I participate?
- **WHEN** will I engage?

Audience:

For meeting leaders – those responsible for preparing teams for scheduled meetings.

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Agenda

TIME:

- 30 minutes

ATTENDEES:

- List of Coalition Attendees (names, titles, orgs)
- List of Leg Attendees (legislator, aide, leg director)
- Meeting Facilitator

OBJECTIVE(s):

- Prepare for meeting with legislators

RESOURCE(s):

- **Internal Shared agenda** → managed by facilitator but all coalition agenda topic leads can take notes, this is NOT shared with the legislators

- **Internal FAQ** → managed by the coalition and includes answers to questions asked during the lifecycle of the campaign. Includes answers to questions like:
    - Who supports this bill?
    - What is the purpose of this bill and who is impacted?
    - Is there similar legislation in other parts of the country?
    - What is the opposition so far and what are the coalition's responses?
- **External agenda** → managed by facilitator and shared with the legislators ahead of the meeting (could be a document or in the content of an email)
- **Materials to review** → ideally shared in advance with the legislators along with the agenda. This could include:
    - Factsheet about the policy (see AB 288 factsheet as an example)
    - Direct link to the bill language (see AB 288 as an example)
    - Other leave-behind materials (see *NCAN College Affordability in CA* as an example)

AGENDA:

1. **Welcome & Why we're meeting** (1-3 min or 1 speaker)
    a. Introduce self
    b. Introduce the topic (e.g. Double Pell or ban scholarship displacement in CA)
2. **Who is here and Why** (1-2 min each speaker)
    a. Organization and relationship to this work
    b. Advocate/leader and relationship to this work
    c. Student and relationship to this work
    d. Other stakeholder and relationship to this work
3. **Why this matters** (2-3 min each speaker)
    a. Testimony #1
    b. Testimony #2-3
    c. Data related to the bill
    d. Costs related to the bill
4. **How can you support and When can we check in again** (5 min)
    a. ASK: Will the legislator support this bill by XYZ?
        i. Have available information on how and when they can engage (e.g. supporting at the Assembly or Senate Appropriations hearing if they are on the committee).
    b. ASK: Can we meet again, and if yes, when?

Suggested Preparation

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1. **WHY are we meeting?** Before scheduling, ensure there is a clear objective that will encourage and inspire attendance and participation.
2. **WHO will be the meeting leader?** This should be someone who can organize people, follow up to ensure meetings are scheduled, and communicate before, during, and after the meeting.
3. **WHO are the required participants?**This should be the person(s) that contribute to the meeting agenda and discussion, such as:
    a. *Legislators* - assembly members or senators that serve on the committees that will discuss and vote on this bill.
    b. *Legislative directors, aides, and analysts* - staffers for the legislators who may attend the meeting with them or in their place.
    c. A notetaker
4. **WHO are the *optional* participants?** This should be the person(s) that *could* contribute to the meeting in one or more ways, directly related to an agenda topic:
    a. *Stakeholders directly impacted by the bill* - this could be organizations, community members, students, etc.
5. **HOW can participants prepare to attend the meeting?** Schedule all required participants for the meeting.
    a. Include the agenda and information needed to remove any barriers to attending the meeting (e.g. Zoom details, address with map, parking and security instructions, printable prepaid parking permit etc.).
    b. Mark those who are required to attend as required, and those who are optional to attend as optional (Google Calendar has such a feature).
6. **WHAT can participants *contribute* to the meeting & WHEN?** You can prepare participants, required and optional, to meaningfully engage by,
    a. Ensuring that all agenda owners and discussion participants know where their agenda item is in the meeting. This will ensure they can participate when called upon, even if they can't attend for the full duration.
    b. Sending all internal participants (the collaborative) the agenda at least 2-3 business days in advance with prompts for how to prepare.
    c. Sending all external participants (the legislators or elected/appointed officials) the agenda at least one business day in advance.
    d. Including in the published agenda or the email any prompts for advanced consideration so they arrive knowing how and when they are able to engage.
    e. Reminding agenda topic owners at least one business day in advance of how to sign in, their expectations, how to reach you should they be late or have trouble getting in, or any other troubleshooting.

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Suggested Follow-Up After the Meeting

1. **Send an immediate follow up!** Assign someone to email the legislator/official within 24 hours of the meeting. That email should include:
    a. The materials and leave-behinds you shared.
    b. A reminder of your ASK and any response they may have offered (e.g. *Thank you for confirming the Senator intends to support our bill at the next hearing…*)
2. **WHY would we meet again?** It's always important to consider the time of the legislators and officials you meet with, they don't have a lot to spare. Aim to confirm the WHY of the next meeting when you close out the meeting.
3. **WHEN will the next meeting be scheduled?** This is really up to the legislator or official and where things are left with your campaign. Here are some considerations:
    a. *Is there a milestone coming up in the next 30 days?* Consider meeting once more to quickly check in and make sure they will support your bill.
        i. Note that in some cases it could be better for your bill author(s) to do a vote count.
    b. *Is there a milestone coming up in the next 90 days?* Consider meeting once more the month before the milestone.
4. **WHO will be the meeting leader for next time?** This should be someone who can pick up from where the last meeting leader left behind.
    a. There is value in consistency of leadership, but also in cross-training so it does not need to be the same person each time. Changing the meeting leader can help build shared leadership over the course of the campaign.
5. **HOW will we know the next steps were completed?** The facilitator should follow up at least once between this meeting and the next meeting to remind them of the action items they own.
    a. An expected report-out at the next meeting is a good carrot (and stick) to get task owners to complete their tasks on time.
6. **WHAT can people do to remain engaged until we meet again?** The facilitator and agenda topic leads should find ways to keep their coalition informed of updates, action items, and relevant news until the next meeting is scheduled.
    a. You could schedule smaller ad hoc meetings to check in on specific topics until the broader group needs to meet again.

For questions about this template, contact Meredith Curry Nuñez, Executive Director of the Northern California College Promise Coalition (NCCPC) at mer@norcalpromisecoalition.org

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