

Independent Sector

Legislative Visits Checklist for Nonprofit Advocates

Your legislative visit is a chance to build relationships with policymakers and their staff, educate them on the impact of policies on the community, highlight the essential role of nonprofits in community well-being, and advocate for policies that strengthen the charitable sector's ability to serve the public good.

Before the Meeting

- ✓ **Research** the legislator's background – their committees, priorities, and history with nonprofit issues. Independent Sector's Action Center can help you get started.
- ✓ **Create** a one-pager with examples of your nonprofit's impact: people served, partnerships formed, or community outcomes achieved.
- ✓ **Review** your organization's key policy priorities and "asks." Make sure your message aligns with how the issue impacts your mission and community.
- ✓ If you are a part of a group meeting, coordinate your meeting roles and speaking order to ensure clarity and flow. Legislative meetings are typically short – **maximize your time**.
- ✓ **Focus on agreement.** Plan to keep the conversation constructive even if the legislator disagrees with your position. Identify shared values such as community well-being, economic opportunity, service to veterans or children to anchor the conversation.

Meeting Roles (If Applicable)

- ✓ **Meeting Leader:** Opens the meeting, introduces the group, and explains why you're there.
- ✓ **Storyteller:** Shares a brief, personal, and localized example of your organization's work.
- ✓ **Policy Lead:** Delivers your key "ask(s)" and connects them to how they strengthen the nonprofit sector's capacity to serve.
- ✓ **Note Taker:** Records key takeaways, commitments, and next steps for follow up.

Sample Agenda and Meeting Flow

1. Introductions

- ✓ Thank the legislator or staff member for their time and service.
- ✓ Briefly describe your organization and the community you serve.
- ✓ If applicable, acknowledge any previous engagement with your work or issue.

2. Purpose of the Meeting

- ✓ Clearly state that you're there to discuss how your organization and the broader sector strengthen communities – and what policy changes would allow you to do even more.

3. Keep It Local

- ✓ Connect on a personal level with a story or data point from your community.
- ✓ Emphasize local jobs, volunteers, and partnerships your organization supports.
- ✓ Highlight impact. Show that nonprofits are not only service providers, they're also economic and civic anchors in the community.

4. Present the Issue and the Ask

Keep it concise. Most meetings last 10-20 minutes, so stay focused and maximize your time.

- ✓ Briefly explain the issue and what you'd like them to do (co-sponsor, support, or oppose).
- ✓ Tie your "ask" to the legislator's priorities.
- ✓ Share the real-world impact of your work and how sector-strengthening policies (like Independent Sector's priorities) help sustain it.

5. Listen and Engage

- ✓ Ask open-ended questions like:
 - "How does your office view the role of nonprofits in your district?"
 - "What are your concerns or reservations about the ask?"
- ✓ If the legislator expresses disagreement, remain nonpartisan and mission focused. Avoid debating, discussing politics or burning bridges. Use responses like:
 - "I hear your concern. Here's what we're seeing on the ground..."
 - "We may not agree, but I believe we both care about [insert values or shared concerns such as strong communities and local solutions]."
- ✓ Listen for areas of shared interest, concern, or questions to guide your follow-up.

6. Closing the Meeting and Follow-Up

- ✓ Reiterate your "ask(s)" clearly, thank them for their time, and summarize next steps.
- ✓ Confirm the best point of contact for future communication.
- ✓ Within 48 hours, send a thank-you email that summarizes your "ask(s)," and includes any requested materials.
- ✓ Keep the relationship going – share periodic updates, success stories, or invitations to your organization's events.

Sample Talking Points on the Nonprofit Sector and Navigating Partisanship:

- Nonprofits make up **almost 10% of the U.S. private workforce** and **contribute over \$1.4 trillion** to the economy. Independent Sector's State Profiles provide data on the impact of nonprofits by state.
- Public policy decisions, from tax incentives to federal grant processes, directly affect our ability to serve local communities.
- When you invest in the capacity of nonprofits, you invest in community solutions that government and business alone cannot deliver.
- Emphasize that our sector relies on trust and partnership with government to deliver essential services to all people, regardless of political affiliation.
- Avoid ideological framing. Instead of "This is about equity", try "This ensures every community - rural, suburban or urban - has access to opportunity".
- Use language that resonates across parties: "Community-driven", "Reducing barriers so nonprofits can deliver results", "Local leadership", etc.