

Best Practices for Effective Virtual Advocacy

1. Focus on what can be gained through virtual advocacy, not what is lost.

- Although in-person advocacy offers some benefits that are difficult to replicate virtually, in-person advocacy is also limited to those individuals who can be in the same room at the same time. Virtual advocacy eliminates those limitations and offers an opportunity to include individuals who may not previously have been able to participate in-person.
- Take advantage of this flexibility to bring together people from different geographic areas and strengthen your advocacy effort by uplifting a diverse group of perspectives.

2. Use technology that works for you *and* for others in the meeting.

- Video conferencing platforms, such as Zoom or Microsoft Teams, can be a great way to simulate an in-person meeting.
- However, flexibility may be needed as some offices may not want or be permitted to use video conferencing. If this is the case, you may still be able to use a video conferencing platform and have the staff dial in without video.
- Even if the staff you are meeting with does not use video, your group might consider using video so you can pick up on nonverbal cues.
- Once the meeting is scheduled, send a calendar invitation to all participants that contains detailed information to access the virtual meeting, including any relevant links or passwords. Remember to account for differences in time zones, and send a reminder email the day before or morning of your meeting.
- If you will be referencing any documents, one-pagers, or reports during the conversation, share those materials before the meeting. Be sure to reference relevant documents throughout the conversation so staff can follow along.

3. Develop a meeting strategy and agenda.

- A clear strategy and agenda are always important in advocacy work, but only become more important during virtual advocacy when it may be more difficult to pick up on body language and non-verbal cues.
- To minimize common pitfalls of virtual communication (such as long periods of silence or unintentionally interrupting others on Zoom), develop a meeting agenda that clearly identifies which issues will be discussed and who will be taking the lead on each topic.
- If time allows, your group should gather shortly before your first meeting to do a final run through of the agenda, make sure all members understand the division of responsibilities, and finalize your strategy.

4. Assign roles and responsibilities.

- Assign one group member to serve as a moderator. This person will kick off the meeting, facilitate introductions, and move the conversation through each topic. The moderator will also keep an eye on the time to ensure that the group stays on schedule and allows sufficient time for questions.
- Before your meeting, determine cues to help group members identify times when others should chime in with examples, or when a topic should be skipped due to time constraints.

5. Be flexible!

How to Schedule a Virtual Meeting

If at all possible, attempt to coordinate your meetings with other members of your state or district. Once you have identified the time or times that you would like to request meetings, contact information for Representatives and Senators can be found here:

- [House of Representatives](#) (If you are unsure of your Representative, you can [use your zip code to search.](#))
- [Senate](#)

Once you have identified your Members of Congress, you should call the office contact number provided through the respective links above and request the email address of the scheduler. Then, email your meeting request to the scheduler and follow up with a phone call. In your message, identify yourself as a constituent and explain that you would like to speak to the legislator about financial aid and higher education issues. If the legislator does not have time on his or her schedule, ask to meet with the legislative aide that handles education issues. Some offices are able to schedule appointments well in advance, while others prefer to wait until the week or two before the requested date, so be prepared to be flexible and patient.

Some offices may also ask you to complete an online meeting request form before they enter your meeting request into the calendar. You will also have to be persistent with some offices, as they may not immediately respond to your request; several follow-up emails or phone calls may be necessary. If you run into any trouble in scheduling your visit, email NASFAA's Policy staff at policy@nasfaa.org for assistance.

In your initial email, you should suggest the meeting platform that you would like to use, but offer to use whatever platform is most convenient for the member or staffer. For example: *"We typically use Zoom as our video conferencing platform, but are happy to be flexible if you prefer another platform for virtual meetings."*

Remember to account for differences in time zones when scheduling virtual meetings. Once a meeting has been scheduled, you should send a calendar invitation to all participants that contains detailed information to access the virtual meeting, including any relevant links or passwords. It's also a good idea to send a reminder email the day before or morning of the meeting that contains any materials you might reference (such as one-pagers or reports) and information on how to access the meeting platform.