



CHARITIES ON THE HILL

Planning guide for your advocacy day

On May 13 and 14, 2015, Imagine Canada and nine national partner organizations piloted a Charities' Day on the Hill event in Ottawa.

Over the course of one day, we held 27 meetings with Senators and Members of Parliament about the importance of the charitable and nonprofit sector to Canadians' quality of life and to the economy in advance of the 2015 federal election.

In this guide, we share the process we followed to organize the event as well as our key learnings at each stage of planning. While the event was held at the federal level, the process and key learnings may apply to the municipal or provincial levels as well.

PRE-PLANNING ACTIVITIES

No one really likes planning. But trust us; this is one of the most important steps to get right!

- Start planning very early, at least three months in advance. Parliamentarians' schedules get booked up quickly. This is particularly true of those higher up the food chain, like cabinet ministers. Your partners and fellow participants will also appreciate the extra time to budget for the event and arrange their own schedules.
- Be clear on the purpose of the day. Is it to generate awareness? Is it to advance a specific policy priority? Is it to engender a spirit of collegiality among participants? Parliamentarians will want you to have specific "asks".
- Appoint a lead staff person responsible for coordination of the event. Overseeing the coordinating tasks of the event should ideally be their sole focus.

PRE-PLANNING ACTIVITIES

- Set a date (minimum 3 months in advance)

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- Clarify the purpose of the day. The purpose of the day is:

- Generate awareness

- Advance a specific policy priority

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- Engender a spirit of collegiality among participants

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- Name of lead staff person responsible for the coordination of the event:

- Budget for the event is

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EVENT PLANNING

SELECTING A DATE

Selecting the wrong date to hold your event can make it almost impossible to book meetings. Selecting the right date, on the other hand, can make planning so much easier.

- Check the Parliamentary calendar. Ensure that the House and Senate are actually sitting on your planned day so that Parliamentarians are in Ottawa rather than in their respective ridings. Also, be aware of busy periods, such as the tabling of a budget.
- Hold the event on a Tuesday: Parliamentarians aren't travelling (like Mondays and Fridays), there are no caucus meetings (like Wednesdays), and Parliamentarians won't be anxious to return to their ridings (like Thursday afternoons and evenings). However, you will have to plan around committee meetings. Be aware that committee meetings can create "no go" zones in the afternoon, leading to a glut of appointments in morning time slots.
- Check with Parliament security prior to picking a date and again the day before the event to anticipate demonstrations or other big events occurring on the same day. Such events won't generally mean cancelled meetings, but they could mean enhanced security or delays in getting from building to building. Also, confirm that security knows about your event a few days prior.

EVENT PLANNING

SELECTING A DATE

Event Date 1

- Is Parliament sitting on this date? **Yes | No**
- Are there any other events occurring on this date? **Yes | No**
Details

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Event Date 2

- Is Parliament sitting on this date? **Yes | No**
- Are there any other events occurring on this date? **Yes | No**
Details

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EVENT PLANNING

BOOKING MEETINGS

Without meetings, you have no Hill Day! Getting your meetings booked is the most time-consuming yet essential element of the planning tasks.

- Prepare target lists well in advance. The list should include your first, second, and even third choices. Adding additional targets late in the game can be time consuming and stall your progress.
- Consider having participants reach out to Parliamentarians they either have a relationship with or that are in their ridings. Parliamentarians are more likely to accept meeting requests where there is an established relationship or natural affinity.
- Establish telephone contact even if only to find out who is responsible for the schedule and to which email account you should send written requests. While most offices will ask for something in writing, which you should send, don't just rely on written communication in making a meeting request. Politicians and their assistants get a huge volume of email; if they don't immediately pick up on it, it's likely to get lost in the shuffle.
- Plan your calls carefully. Aim to call when the House is sitting, rather than during recess weeks. Staff will wait until their MP or Senator returns to Ottawa before consulting them about the meeting, and a request during a recess week may fall through the cracks or become lower priority.
- Try making calls at different times of the day. We found that making calls early in the morning (between 8:30 and 9:15 a.m.) or during lunch time (12:00 to 1:30 p.m.) were the best times.
- Be respectful of language preferences. Take note of which Parliamentarians are Francophone, and consider making the call in French.
- Verify meeting locations and room numbers when confirming meetings with Parliamentarians.
- Re-confirm meetings 24 or 48 hours in advance. Provide the names of those colleagues who will be attending the meeting, their biographies, and any other supporting information. The scheduling assistant will likely ensure that security is notified of the participants' arrival. Also, make sure the scheduling assistant has contact information so they can reach you if there are any last minute glitches — which there inevitably will be.

EVENT PLANNING

BOOKING MEETINGS

- Prepare target lists. For each Parliamentarian, capture**
 - Language preference: English Français
 - Name of participant with existing relationship who can make a call
 - Notes regarding the Parliamentarian's previous involvement in your cause:
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- Book meetings. For each Parliamentarian:**
 - Establish telephone contact with office. Contact name and information:
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 - Send follow-up email
 - Verify meeting time and location
 - Time
 - Location
 - Re-confirm meeting 48–24 hours in advance
 - Provide names of participants who will be attending the meeting, their biographies and other supporting information

EVENT PLANNING

GENERATING CONTENT

A successful Hill Day consists of more than just meetings. You need to have substance to talk about as well as specific “asks” to articulate to Parliamentarians.

- Generate content for participants and Parliamentarians well in advance to ensure there is adequate time for design, translation (if necessary), printing, and dissemination.
- Distribute briefing material to participants one week in advance. Material may include bios of your participants and Parliamentarians, key messages, meeting tips, and schedules.
- Host a mandatory briefing workshop for all participants to ensure that key messages and strategy are well-understood. Give participants the time to role play within their meeting groups.
- Create a leave-behind for Parliamentarians that contains key messages. The material should reiterate the “asks” and explain clearly why they are important and what can be done.

EVENT PLANNING

GENERATING CONTENT

Briefing materials for participants (examples)

- Biographies of Parliamentarians
- Biographies of fellow participants
- Key messages
- Meeting tips
- Meeting schedules
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Materials for Parliamentarians (examples)

- Biographies of participants
- Leave-behind containing key messages and “asks”
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- Schedule briefing workshop for all participants
- Time
- Location

EVENT PLANNING

CREATING PARTICIPANT GROUPS

During Hill Days, groups of participants generally travel to meetings together. The composition of these groups can be a really strategic choice.

- Ensure participant groups consist of a maximum of three to four people. This ensures that each participant can be actively involved in the meetings and has a comfortable place to sit (some Parliamentary offices are quite small!).
- Ensure wherever possible that there is diversity in your groups (e.g. Francophone representatives and gender mix).
- Consider including project officers or field workers who can enrich the discussions by speaking to policy implications as they are experienced on the ground in communities.
- Consider matching junior professionals or those without advocacy experience with seasoned advocacy professionals as a professional development opportunity.
- Include a lead staff representative in the group to help participants find their meetings as well as to set the stage for the meetings. It helps if the staff person has walked the meeting route in advance of the event as meetings may be held in different buildings.
- When possible, include someone in each group who has an existing connection with the politician being met.
- Make sure someone in the group has a smart phone and a Twitter account to share the meetings with the world.

EVENT PLANNING

CREATING PARTICIPANT GROUPS

Collect the following details for each participant group

Participant group 1

- **Name 1**
Role
Organization
Twitter handle
Email
Cell phone
- **Name 2**
Role
Organization
Twitter handle
Email
Cell phone
- **Name 3**
Role
Organization
Twitter handle
Email
Cell phone
- **Name 4**
Role
Organization
Twitter handle
Email
Cell phone

EVENT PLANNING

WRAP-UP RECEPTION

Hosting a wrap-up reception at the end of your Hill Day is a great way to involve Parliamentarians who couldn't schedule meetings during the day. It also provides an opportunity for more informal networking to occur.

- Don't hold an evening reception on a Thursday as Parliamentarians generally travel back to their ridings that evening.
- Send mail-out invites to Parliamentarians in addition to e-invites. Assistants find them convenient to show to their bosses. Emails easily get overlooked or deleted.
- Invites should clearly indicate whether the event is catered, if there is a cost, and whether staff members are invited.
- Consider inviting Parliamentarians and select staffers. Keep in mind, however, that these invites can easily get out of hand resulting in attendance by temporary interns or volunteers.
- Be strategic with your location. A small venue on the Hill might have a better feel than a large venue if turnout is small. A venue on the Hill may also be more accessible for Parliamentarians resulting in a better turnout. However, attendees may leave early if the room is too small and overcrowded.

EVENT PLANNING

WRAP-UP RECEPTION

Date and time

Venue

Contact information

Venue cost

Caterer

Contact information

Catering cost

Menu details

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Do you need to obtain a liquor license? **Y | N**

Sponsor 1

Sponsor 2

Sponsor 3

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After date is set

Send invite to Parliamentarians

(clearly indicate whether event is catered, if there is a cost and whether staff members are invited)

- E-invites
- Mail-out invites
- Reminder e-invites on the day of the event

POST-EVENT

Did you think you'd be finished once the meetings were over and participants were off the Hill? Not a chance. There is still important work to be done.

- Do your follow-up. Send personalized and tailored thank you letters to Parliamentarians shortly after your Hill event. Be sure to answer any unanswered questions raised during the meetings. It's also a nice touch to include any pictures that were taken during the meeting.
- Create organizational memory. Document key learnings about Parliamentarians for future interactions, including their pet projects of interest, background, and relative knowledge of the sector. Also debrief with your organizing team and participants to capture any details for next year's event.

POST-EVENT

- Send personalized and tailored thank you letters to Parliamentarians

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- Document key learnings about Parliamentarians (including their pet projects of interest, background, and relative knowledge of the sector)

- Debrief with event participants

Time

Location

- Debrief with your organizing team

Time

Location