

La Crosse County Human Services

How-To Guide: Planning and Hosting an In-District Legislative Meeting

This guide provides step-by-step instructions, real-life tips, and adaptable tools to support local professionals, including Aging and Disability Resource Center (ADRC) and aging unit staff, in coordinating and facilitating effective in-district meetings with legislators.

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LA CROSSE COUNTY

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Background and How to Use This Guide

This how-to guide was developed to support Aging and Disability Resource Centers (ADRCs), aging unit staff, and community partners in planning and facilitating in-district legislative meetings. It is based on the 2025 experience of the ADRC of La Crosse County but is intended to be adaptable for use across Wisconsin.

The meeting described in this guide was one of a few hosted across the state as part of an advocacy effort initiated by the Aging and Disability Professionals Association of Wisconsin (ADPAW). These events aim to strengthen relationships between communities and policymakers by combining data with personal stories in a local, accessible setting.

What's Inside:

- Step-by-step planning instructions
- Help tips based on real experience
- Sample emails and communication templates
- Suggested roles and responsibilities
- Examples of materials and follow-up tools

Use this guide to inform your own process and adapt the contents to fit your local priorities and partnerships. A planning checklist is also included in the appendix to help guide your efforts.

Together, we can make a difference—good luck!

Step 1: Define Your Goals and Priorities

- Identify 2-3 key issues you want to highlight (e.g., ADRC investment, transportation, nutrition).
- Gather relevant data, issue briefs, and local stories to support your message.

Tip: Align your priorities with current legislative timelines or budget cycles for greater impact.

Tip: Let the interests of participating constituents help guide which issues you focus on.

Tip: Find Wisconsin Aging Advocacy Network (WAAN) issue briefs on the [GWAAR website](#).

Step 2: Coordinate with Partners and Stakeholders

- Reach out to peers, community partners, and advocacy organizations for support.
- Decide if the event will be private or public. If public, determine whether to invite local media.
- Assign roles early. Identify who will help with logistics, secure speakers, or prep materials.

Examples of Roles to Assign:

- **Logistics Coordinator:** Books the meeting space, confirms room setup, ensures signage and accessibility, identifies and secures refreshment needs (not required).
- **Legislator Liaison:** Handles outreach and follow-up communication with legislators.
- **Participant Coordinator:** Recruits, confirms, and briefs constituent speakers; collects written testimony.
- **Materials Lead:** Prepares folders, prints issues briefs and handouts, and organizes name tags/sign-in sheets.
- **Facilitator or Moderator:** Leads the meeting, keeps things on track, and transitions between segments.
- **Photographer/Notetaker:** Captures photos for follow-up and documents key takeaways from the discussion.
- **Communications Support:** Promotes the event (if public) through newsletters, social media, or press outreach (if appropriate) or manages targeted invitations (if private).

Tip: Work with staff to build the invite list, particularly with the focus on constituents with stories to share and County Board Members and/or local administration to deliver opening remarks.

Resource: See Appendix A for a sample email to engage peers and/or community partners.

Step 3: Secure a Location and Set a Date

- Choose a central, accessible location (e.g., county administrative building, library, or senior center) with adequate parking.
- Confirm room setup (table(s), chairs, AV needs, sign-in table).

Tip: Try to schedule your meeting on a Monday or Friday, when legislators are most likely to be in their districts. Aim for a meeting length of no more than 1.5-2 hours to respect everyone's time.

Tip: If time allows, connect with legislators to propose a few day and time options before confirming, then follow-up with a formal invitation once the date, time, and location is set.

Step 4: Contact Legislators and Extend the Invitation

- Send a formal invitation to your state legislators.
- Include the purpose of the meeting, key topics, date/time/location, and RSVP instructions.
- Follow up with a phone call or staff contact 1-2 weeks before the event.

Tip: If your event is private, make that clear in your in your invitations.

Resource: See Appendix B for a sample email to invite legislators to the event.

Resource: See Appendix C for a sample email to remind legislators of the event.

Step 5: Promote the Event and Secure Participants

- Use word of mouth, flyers, newsletters, and social media (if public).
- Invite constituents who can speak to the issues from lived experience.
- Encourage others to attend in support or submit written remarks.

Tip: If technology allows, offer a virtual option so constituents can participate remotely, especially helpful for those with transportation or health barriers.

Resource: See Appendix D for a sample email to invite local administration to the event.

Resource: See Appendix E for a sample email to request assistance securing participants.

Step 6: Prepare Materials

- At minimum, create a folder (or packet) for legislators with:
 - Local information (i.e., program brochures)
 - Issue briefs (one per topic, if available)
 - Copies of written testimony (if applicable)
- Develop a simple agenda for attendees.
- Prepare table tents with participant names and affiliations and/or topic of interest.

Tip: Include your business card, or other contact information, for legislators to reference.

Resource: See Appendix F for image of Legislator folder/packet.

Resource: See Appendix G for a sample agenda.

Resource: See Appendix H for sample table tents.

Step 7: Facilitate the Meeting

- Begin with introductions and a brief welcome.
- Allow a partner or board member to open with local context.
- Share your remarks to frame the discussion.
- Organize constituent speakers by topic.
- Keep track of time to allow for open discussion at the end.

Tip: A conversational tone creates a more comfortable space for engagement.

Tip: Brief speakers ahead of time to keep comments around 3-4 minutes.

Tip: Create an attendance list organized by constituent and topic of interest. This helps the facilitator or moderator confidently call on each person at the appropriate time during the event.

Tip: Secure staff or other appropriate representatives in advance to read written testimonies on behalf of constituents unable to attend, if time permits during the event.

Step 8: Follow Up

- Send thank you notes to legislators, participants, and partners.
- Provide any follow-up information requested during the meeting (e.g., funding breakdowns).
- Share photos with elected officials in attendance.
- Share photos and highlights in internal or external newsletters.

Tip: Send thank you email (or handwritten note) within 1-2 days.

Resource: See Appendix I for a sample email to thank legislators after the event.

Appendix A: Sample Email to Engage Peers and/or Community Partners

Subject: ADPAW In-District Legislative Meetings – call to action

Hi West ADPAW Region!

As we did last year, I'm reaching out to see if you'd be interested in **collaborating on a regional in-district legislative meeting** this spring. I'd be happy to host and take the lead again this year.

This year's event will be a little different—rather than a larger public event, we plan to host a private meeting with a small group of individuals who are willing to share personal stories related to each of the Aging Advocacy Day issue briefs.

The meeting will take place after Aging Advocacy Day (May 13) but no later than mid-June, and ideally on a Monday or Friday, which are generally preferred by legislators.

If you're interested in participating, please respond as soon as possible, as I'd like to reach out to legislative offices and confirm a date before Aging Advocacy Day so we can remind them of the in-district meeting when we're at the Capitol on the 13th.

Also, please let me know if there are any Mondays or Fridays in that time frame that would not work for you, should you want to participate.

Thanks so much, and I look forward to hearing from you!

Best,
Carissa

Appendix B: Sample Email to Invite Legislators to the Event

Subject: Invitation: La Crosse County In-District Meeting – June 9

Dear Senator Pfaff,

I am writing to extend an invitation for an in-district meeting with La Crosse County constituents.

Date: Monday, June 9, 2025

Time: 1:30–3:00 p.m.

Location: Basement Auditorium, La Crosse County Administrative Center, 212 6th St N

This meeting will serve as a **private follow-up** to the issues presented during **Aging Advocacy Day on May 13**. Most attendees have confirmed their availability for this date and time, and we would be honored to have you join us for this important discussion.

Please let me know if this works with your schedule. We look forward to your participation!

Best regards,
Carissa

Appendix C: Sample Email to Remind Legislators of the Event

Subject: RE: Invitation: ADRC In-District Meeting with Legislators – June 9

Hello Representative Johnson's Office,

This is a friendly reminder that our La Crosse County in-district meeting is scheduled for this coming **Monday (June 9) at 1:30 pm**. The private event will take place in the **basement auditorium of the La Crosse County Administrative Center**. We will conclude by 3:00 pm.

Given local constituent interest, we plan to focus on three priorities: ADRC investment, Specialized Transportation, and Senior Nutrition. For your reference, I have attached issue briefs.

Invites have also been extended to Sen. Pfaff and Reps. Billings and Doyle as well. As far as constituents, the following are planning to attend, with the possibility of a few more joining in support of nutrition. ADRC staff will read written testimony on behalf of clients unable to attend.

1. Kay – La Crosse – ADRC investment
2. Karen – La Crosse – ADRC investment (written testimony)
3. Neary Family – Holmen – ADRC investment (written testimony)
4. Sue – La Crosse – ADRC investment (written testimony)
5. Gary – La Crosse – ADRC investment (written testimony)
6. Kathy – La Crosse – Specialized Transportation
7. Mark – Onalaska – Specialized Transportation (virtual)
8. Debbie – La Crosse – Specialized Transportation (virtual)
9. Mary – La Crosse – Specialized Transportation
10. Donovan – La Crosse – Specialized Transportation
11. Kim – La Crosse – Specialized Transportation
12. Georgia – La Crosse – Senior Nutrition

General agenda: We will begin with brief introductions. Dillon Mader, Chair of the Health & Humans Services Board, will offer opening remarks, followed by myself. After approximately 10-15 minutes of introductory comments, we will hear directly from constituents. You are welcome to respond during the discussion or share closing remarks toward the end of the event.

We hope this will be a causal, engaging opportunity to learn about local aging needs.

If you have any questions, or would like to discuss anything in advance, do not hesitate to call.

Warm regards,
Carissa

Appendix D: Sample Email to Invite Local Administration to the Event

Subject: Invitation: ADRC In-District Meeting with Legislators – June 9

Hi Jane, Sara, Tina, and Dillon,

I wanted to inform you about an upcoming in-district meeting with La Crosse County constituents and several members of the state legislature, which will serve as a follow-up to the issues raised during **Aging Advocacy Day on May 13**.

Date: Monday, June 9, 2025

Time: 1:30–3:00 p.m.

Location: Basement Auditorium, La Crosse County Administrative Center

This meeting will be similar to last year’s legislative town hall; however, this year, we are hosting a more intimate, private event with a select group of constituents. These individuals will have the opportunity to share personal stories and experiences related to key issues outlined on 5/13:

- ADRC investment
- In-home direct care workforce support
- Home-delivered meals funding
- Healthy aging: falls prevention
- Specialized transportation funding

Invitations have been extended to Representative Billings, Doyle, and Johnson and Senator Pfaff.

I would like to extend an invitation to you as well. If you are available and interested, your presence at the event would be greatly appreciated as we engage in this important discussion.

Please do not hesitate to reach out if you have any questions or need additional information.

Thank you for your continued support!

Best regards,

Carissa

Appendix E: Sample Email to Staff to Help Secure Participants

Subject: Help Needed: Identifying Constituents for 6/9 Legislative Event

Dear ADRC Team,

I am excited to share that we are hosting an **in-district legislative meeting** on **Monday, June 9, from 1:30–3 p.m.** in the **Basement Auditorium of the La Crosse County Administrative Center**.

This will be a **private event** bringing together a small, thoughtfully selected group of La Crosse County constituents to share their personal experiences with state legislators as a follow-up to Aging Advocacy Day. I have invited Representatives Billings, Doyle, and Johnson, as well as Senator Pfaff, and they are expected to join us.

The goal is to give legislators a deeper, more personal understanding of the following key issues:

- **ADRC Investment**
- **In-Home Direct Care Workforce Support**
- **Home-Delivered Meals Funding**
- **Healthy Aging: Falls Prevention**
- **Specialized Transportation Funding**

To make this event a success, **I need your help identifying 2–3 constituents per topic** who can share their stories. As you know, it is always far more impactful when legislators hear directly from those affected. Here is a little more context on what I am hoping constituents can offer:

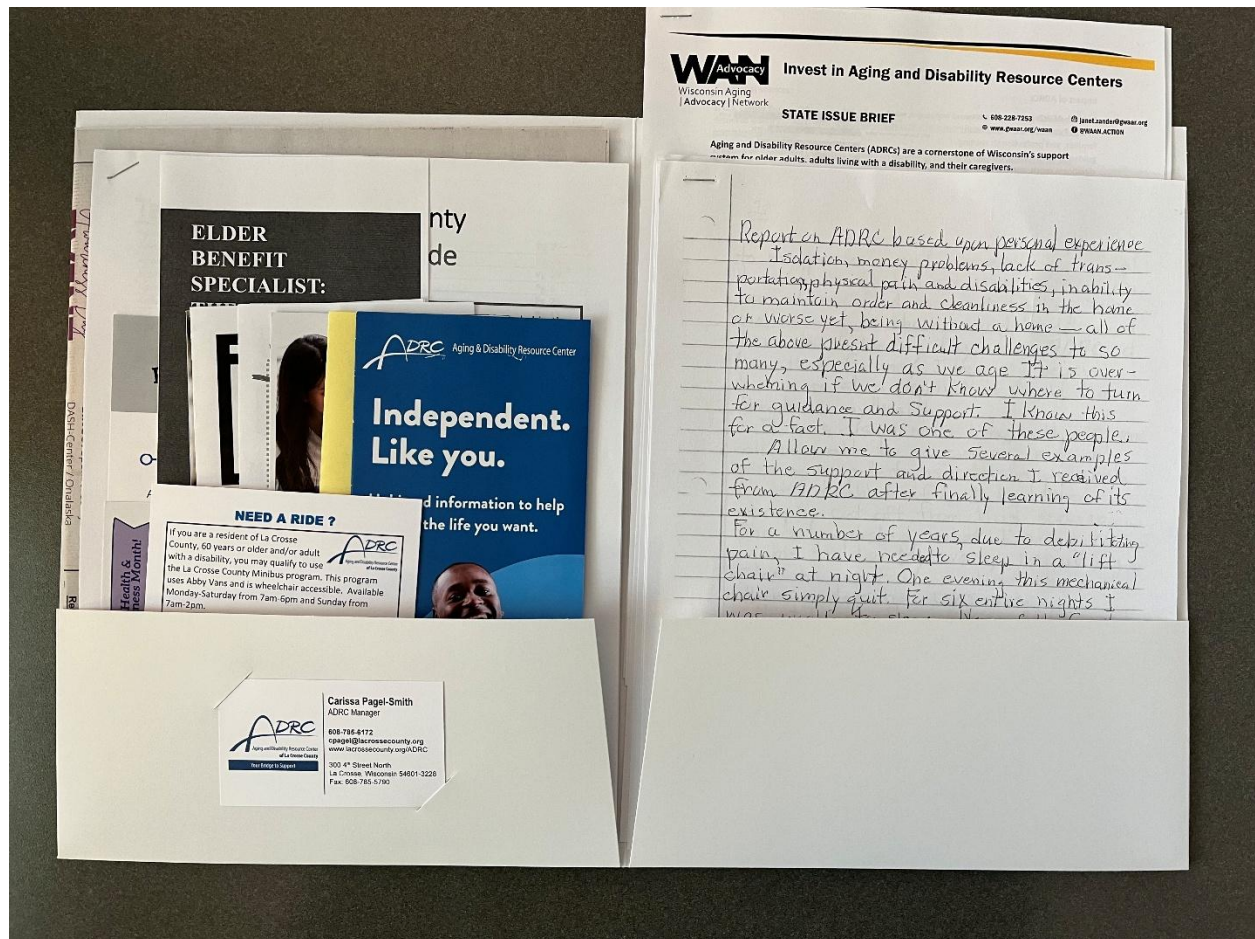
- **ADRC Investment** → Someone who has benefitted from ADRC services or can speak to how ADRC supports older adults/adults with disabilities.
- **In-Home Direct Care Workforce Support** → Individuals/families struggling with finding or keeping in-home caregivers or impacted by workforce shortages.
- **Home-Delivered Meals Funding** → Older adults or caregivers who depend on Meals on Wheels or similar services to remain safe at home.
- **Healthy Aging: Falls Prevention** → Participants in falls prevention programs or those impacted by falls who can highlight the importance of prevention efforts.
- **Specialized Transportation Funding** → Riders or caregivers who rely on specialized transportation for medical care, shopping, or staying connected to the community.

If you have one or more individuals in mind, please check in with me first before contacting them. Since this is a private event with limited time, I want to ensure we have even and adequate representation across all topics.

Thank you so much for your help—your input will be key to making sure we amplify the voices that matter most!

Best,
Carissa

Appendix F: Image of Legislator Folder/Packet



The contents on the **left side** include a variety of ADRC of La Crosse County program brochures, the monthly newspaper, a local resource guide, and promotional flyers for a few upcoming events. The **right side** contains copies of written testimonies received and the related issue briefs.

Appendix G: Sample Agenda

In-District Legislative Roundtable

Date: Monday, June 9, 2025

Time: 1:30 PM – 3:00 PM

Location: La Crosse County Administrative Center

AGENDA

1:30 PM – Welcome & Introductions

Brief introductions from all attendees (name & role)

1:40 PM – Opening Remarks

Dillon Mader, Chair, Health & Human Services Board

– Local context on the three priority areas

1:45 PM – Remarks from the ADRC

Carissa Pagel-Smith, ADRC Manager

– Overview of the day's format and purpose

1:50 PM – Constituent Testimony

Organized by topic area:

- ADRC Investment (20 minutes)
- Specialized Transportation (20 minutes)
- Senior Nutrition (10 minutes)

2:40 PM – Legislator Reflections & Open Forum

Opportunity for dialogue and comments

3:00 PM – Adjourn

Carissa Pagel-Smith
ADRC Manager

Dillon Mader
HHS Board Chair
County Board Supervisor – District 30

Brad Pfaff
State Senator
32nd Senate District

Mary Smith
Specialized Transportation

Appendix I: Sample Email to Thank Legislators for Attending the Event

Subject: Thank You for Joining Our In-District Meeting

Dear Senator Pfaff, Representative Billings, and Representative Johnson,

Thank you for taking the time to attend yesterday's in-district legislative meeting and engage in meaningful conversation around aging and disability services in La Crosse County. We truly appreciated your presence and the attention you gave to the personal stories and perspectives shared by constituents.

As you heard, the need for continued—and in some areas, expanded—investment in ADRCs, specialized transportation, and senior nutrition remains critical to ensuring older adults and individuals with disabilities can remain safe, independent, and connected to their communities. Your willingness to listen, ask questions, and understand both the successes and challenges we face locally means a great deal.

Attached are a few photos from the event, as well as the funding breakdown requested for each of the three program areas we discussed. If you have any additional questions or would like more detailed information, I would be happy to provide it.

Thank you again for your time, support, and leadership. We look forward to continued collaboration in support of our aging and disability communities.

Warm regards,
Carissa

[Attachments: Three photos from the event and Word document with local funding breakdown]

Appendix J: In-District Meeting Planning Checklist

Use this checklist to guide your planning process and stay organized from start to finish.

PLANNING AND PREPARATION

- ☐ Identify 2-3 key advocacy issues (e.g., ADRC investment, transportation, nutrition)
- ☐ Gather local data, stories, and issues briefs
- ☐ Reach out to ADRC/aging unit colleagues, peers, and community partners
- ☐ Decide whether the event will be private or public; consider inviting media if public
- ☐ Assign planning roles (e.g., logistics, legislator liaison, facilitator, notetaker)

LOGISTICS

- ☐ Select an accessible, central meeting location
- ☐ Coordinate potential dates with legislators
- ☐ Confirm final date, time, and room set up
- ☐ Ensure signage, AV needs, and refreshments (if applicable)

OUTREACH

- ☐ Send formal invitations to legislators
- ☐ Follow up with legislator offices 1-2 weeks prior
- ☐ Invite County Board members and local administration
- ☐ Secure constituent speakers and/or written testimony
- ☐ Send general invitations or manage targeted outreach (based on event type)

MATERIALS AND PROMOTION

- ☐ Create legislator folders (program brochures, issue briefs, testimony)
- ☐ Prepare agenda, table tents or name tags, and sign-in sheets
- ☐ Promote via flyers, newsletters, or social media (if public)
- ☐ Offer a virtual participation option, if appropriate

DAY-OF MEETING

- ☐ Welcome attendees and provide opening remarks
- ☐ Frame the meeting purpose and structure
- ☐ Organize and facilitate constituent stories by topic
- ☐ Keep time and engage legislators
- ☐ Take notes and capture photos (if appropriate)

FOLLOW UP

- ☐ Send thank you emails to legislators, speakers, and partners
- ☐ Provide requested follow up materials or details; share photos
- ☐ Share highlights or photos in internal/external newsletters
- ☐ Debrief with staff/partners and document lessons learned