

 **END CORPORATE RULE. LEGALIZE DEMOCRACY.**  
**MOVE TO AMEND**

**Lobbying: A Guide for Move to Amend Affiliates**

*- September 2011\* -*

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## **INTRODUCTION**

Lobbying is a valuable skill, and one often underutilized by local grassroots organizations. The purpose of this guide is to help you lobby effectively on the state and local level.

## **WHAT IS LOBBYING?**

Lobbying is an effort made to influence the actions of elected officials. Your elected officials are in office to represent *you*, their constituent. It is their job to listen to your concerns and to take them into account when making decisions. However, elected officials are not mind readers, - you must tell them what you want them to do. Lobbying is how you do that.

Lobbying is something that anyone can do - and something that many more people *should* do. When used by people working in the public interest, lobbying is a force for *good*.

## **LOBBYING BASICS**

You will typically use lobbying to:

- *Educate* an elected official about an issue
- *Identify* whether she is a supporter of your position, an opponent, or undecided
- *Move* a supporter to be a champion, or an undecided individual to be a supporter
- *Soften or neutralize* an opponent

Elected officials are most responsive to their own constituents, and so constituents should play a central role in any lobbying effort. They also respond to those who have influence with their constituents (e.g. university presidents, business leaders), to people who have volunteered on their campaigns, and to their donors.

Like anyone else, elected officials are influenced more by people they know, so try to build relationships with them. If possible, start this process before you ask for anything specific. A good way is to set up an in-person visit with the officeholder before your campaign is in full swing to educate her about your issue.

In general, you are more likely to be effective if you can explain how taking the action you want will benefit the elected official or that official's constituents, rather than just how it will benefit you. So, make an effort to see things from the officeholder's point of view.

Finally, the more personal and effort-intensive a lobbying method is, the heavier its impact. For example, a hand-written letter carries much more weight than a pre-printed postcard, and an in-person visit has the most impact of all methods.

## WHO CAN LOBBY

Anyone may help an elected official understand an issue better, but certain people may not ask an elected official to take a position, or to vote in a particular way. In other words, everyone may educate, but not everyone may advocate.

Federal government employees are barred from advocating at the federal level, while employees of some state and local governments also face restrictions at their levels of government (laws vary across the country). In addition, some types of nonprofit organizations (e.g. 501c3s) are subject to restrictions on their advocacy activities.

## IN-PERSON VISITS

In-person visits have the highest impact per person of any lobbying method, and are a great way to build personal relationships with elected officials. This section gives tips for using in-person visits effectively to achieve your goals.

### ***Mapping Out A Strategy***

Before asking to meet with any elected officials, you should map out a broad *strategy*.

First, clearly articulate what you are trying to achieve. Ask yourself if there is a second-best outcome if you cannot get exactly what you want.

Next, decide which elected bodies and officeholders to lobby. For example, if you are asking the city council to pass an ordinance, you should probably also consider asking the mayor for her support. Also, learn about the decision-making process. For example, how is an ordinance proposed? How many votes are needed to pass it? What role does the mayor play?

Now, learn about the individual officeholders. Gather information on their biographies, personal interests, stances on issues, and any bills or resolutions they have sponsored in the past. Also educate yourself about their districts (e.g. location, major industries or employers, rural or urban). Finally, identify which ones occupy positions of power (e.g. president, chair of a relevant committee), or are otherwise influential (e.g. well-respected, been in office for a long time). Much of this information should be available online, but also try to talk with people who know the local political scene well. In order to not burden any member of your organization too heavily, consider sharing the work of researching officeholders among several people.

Place the elected officials into three categories: likely supporters, likely opponents, and uncertain. Figure out which members of your organization are constituents of each officeholder, and whether any of your members know officeholders personally.

If you hope to initiate a resolution or piece of legislation, you will need to identify a *lead sponsor*. This person will put forward the item and try to convince the rest of the elected body to pass it. A well-respected lead sponsor who is enthusiastic and committed to your cause will strongly increase your chances of success, so choose wisely. You should confirm your lead sponsor before meeting with other elected officials.

Now, determine the order in which you will approach the other elected officials. Consider who is likely to be most supportive, how those contacted first might impact those approached later (e.g. if you ask all the left-leaning members of the city council first, will it be harder to convince the right-leaning ones later?), and whether anyone should be contacted early out of respect (e.g. the city council president). Once you have determined the order in which you will approach elected officials, you are ready to begin setting up meetings.

### ***Setting up the Meeting***

To request a meeting, send the officeholder an email or call her office. Identify yourself and your organization, explain briefly what the meeting will be about, and give the estimated number of attendees. Ideally, the person who asks for the meeting should be a constituent, know the elected official, or have some other connection to her. If you don't get a response back within a couple of days, try again. You may be asked to come to her office or to meet in another location, such as a coffee shop.

### ***Who Should Attend***

It is typical for 2-4 people meet with an officeholder. This size group is easy to accommodate in most locations, and it is small enough that everyone can participate in the conversation. Every meeting should ideally include at least one constituent, and the person who requested the meeting should also attend.

If you really want to impress an officeholder with your level of community support, you may recruit more constituents to attend (meetings with 15-20 people are not unheard of). If you do this, designate 2-4 people as primary spokespeople. Be aware, however, that the officeholder may insist on talking to each person, especially if she wants to avoid the business you are there to discuss. For this reason, large meetings are best when you have a clear, simple message (e.g. "please vote for this bill") and you don't need to engage in detailed conversation.

### ***Materials to Prepare***

Unless the meeting is purely educational, you should have an explicit *ask*. You should also clearly articulate your *main messages* (i.e. what you want the official to take away from the meeting). Write these things down to get them clear in your mind.

Now, prepare two documents: a) *talking points* and b) *answers to likely questions*. Ask those who will attend the meeting to study them beforehand.

Next, prepare a short *white paper* to give to the elected official. This is a one-page document (two at most) that summarizes your issue, provides background facts (e.g. poll results), and communicates your main messages. If you are urging support for a bill or resolution, include the bill's number or the resolution text. Provide contact information for at least one individual present at the meeting, and if you have a logo, website or dedicated phone number, include these also. The white paper should be easy to understand on a quick read: keep the language simple, the sentences and paragraphs brief, and use bold text and bulleted lists to highlight the most important parts. Print enough copies for the elected official and every member of your group.

If you have additional materials that you believe will help make your case (e.g. newspaper clippings), bring these too. Don't bring too many materials along, however, as it is unlikely that the officeholder will read many of them.

### ***Prior to the Meeting***

Before you meet with the officeholder, review what you know about her and her district. Try to find ways to connect with her on a personal level (e.g. if your children went to the same high school, or if you appreciate her advocacy for the environment). Also, see if you can find a few personal stories to share (e.g. your experiences collecting petition signatures, or how you want your child to grow up in a country ruled by We the People, not We the Corporations).

Meet with the others who will attend the meeting to go over your messages and ask, rehearse your talking points, and practice responses to likely questions. Identify the order in which you plan to make your main points, and divide up what you are going to say between yourselves (this gives everyone a chance to talk, and helps ensure that everything important gets covered). Also, pick someone to take notes.

### ***How to Dress***

Everyone in your group should be neat and well-groomed. In more official settings (e.g. an office in the state capitol) you should dress somewhat formally (e.g. a skirt or dress pants for women, a dress shirt and slacks for men). In a casual setting (e.g. a coffee shop) more casual attire is acceptable. If in doubt, dress up a little until you figure out what is expected.

### ***At the Meeting***

Arrive at the meeting a few minutes early. If you are told that the officeholder is not available and you will be meeting with her staffer instead, don't take it personally; this happens frequently. Just conduct the meeting as you would have with the elected official.

Be friendly and upbeat. Introduce yourselves, and identify who in the group is a constituent. Ask how much time you have for the meeting (15-30 minutes is common). Give the officeholder your white paper and any other supporting materials. Explain the issues using brief, clear

statements and the personal stories you prepared, and ask if the officeholder has any questions. If you don't know an answer, say that you'll look into it and get back to her (you don't need to be an expert on everything).

Unless this is a purely educational meeting, make sure to make your ask before the end of the meeting. Say it clearly and explicitly (e.g. "Will you vote 'yes' on this resolution?"). If the officeholder has concerns, try to address them.

If the officeholder says she will do what you ask, thank her. Offer to be a resource: ask if you can provide additional information, or anything else helpful. Also, try to move her from being a supporter to a champion. For example, if she agreed to vote for an ordinance, ask if she will cosponsor it. If she agreed to cosponsor it, ask if she will help get her colleagues onboard.

If she is undecided, try to understand why, and ask if there is any additional information you could provide. If she is opposed, try to understand her reasons. Don't be argumentative or burn bridges, as you may need to work with her again in the future. Thank her for her time.

### ***After the Meeting***

After the meeting, send the elected official a follow-up email or letter. Thank her again, reiterate your main points, and remind her of anything she agreed to. Also send any additional materials or information that you said you would.

If the officeholder was undecided, try to mobilize people with influence to sway her (e.g. constituents, donors, the lead sponsor). Plan to reach out to her again later.

## **OTHER METHODS OF LOBBYING**

Other methods of lobbying include petitions, letters, postcards, emails and phone calls. These methods can be used alone, or to supplement in-person visits.

### ***Petitions***

A petition signed by many constituents can help convince an officeholder to take your position. Petitions can be circulated either in hard copy or electronically (there are many free online petition sites, such as GoPetition and PetitionOnline). You can also print out copies of the Move to Amend petition (a downloadable copy is available on the website).

### ***Letters, Postcards and Emails***

Letters, postcards and emails sent by constituents are effective lobbying tools. Remember, communications requiring more effort count for more. Personal letters carry much more weight than form letters, and a hard copy is worth more than email.

When asking someone to write a message, give her some talking points and identify the ask clearly. Provide a sample message, but ask her to personalize it. Make sure to give her any needed information, or let her know how to find it (e.g. her officeholder's name, email address).

Tabling in a busy location is a good way to collect letters and postcards; just ask passersby to stop and write one, and tell them that you'll deliver it later. Emails work well when asking people physically removed from you to contact their elected officials.

### ***Phone Calls***

A phone call generally carries more weight than an email, but can be solicited by the same means (e.g. via email, Facebook, phone). When tabling, you can also ask people to make calls using their cell phones (it's best that each person use her own phone, since officeholders usually have caller id).

Give each caller a script (i.e. a sample version of what to say). Also provide her with background information on the issue, the name of her elected official, and the number to call.

## **THE VOTE**

If you are urging the adoption of a resolution, the defeat of a piece of legislation, or some other legislative act, your final lobbying push will come right before the vote. In the last few days, step up your efforts. Urge people to make calls and send emails (even if they've done so before).

In some cases a separate public hearing will be held, while in others the public will be able to speak at the start of the legislative meeting itself. In either case, get as many local people as you can to come, ideally from a variety of districts. Also try to get influential individuals (e.g. business leaders, donors) to attend. Ask a few well-spoken individuals to prepare testimonies and speak, and the rest to register in support of your position.

If the elected body votes your way - celebrate! Throw a party or have a picnic, and invite everyone who contributed to the effort to attend. If it doesn't go your way, let your members know the outcome, and celebrate the smaller victories that you did achieve.

No matter what happens, send thank-you cards to every officeholder who voted the way you wanted her to. Elected officials are like the rest of us: they appreciate having their contributions recognized, and will be more likely to work with you again in the future if you thank them.