



Lobbying: How to Effectively Communicate with Decision Makers

BACKGROUND: Meeting with legislators on regular basis will allow you to build powerful relationships with legislative staff and members, and help to put a human face on what are sometimes complex and abstract policies. Below are tips for meeting with Legislators.

PREPARING FOR A LOBBY DAY

Get familiar with the issues

- Understand the scope of the issue and the position of the different parties involved
- How is your perspective on the issue similar to, or different from, the perspective of others involved?
- Understand how the issues might affect those in your community, or you personally.
- Find out how Democrats and Republicans might understand the issue.
- Go to www.senate.ca.gov or www.assembly.ca.gov to find the bill language and analysis and search the internet for other background information on the issue. Also visit CommonCause.org/CA for information on government reform issues and Common Cause's position on the issue.

Research your legislators

- If you are meeting with returning member of the legislature, review how they have voted on related issues in the past
- Will you be meeting with a Republican or a Democrat? Find out if they sit on the committee that would hear a bill related to the issue, or if they part of the legislative leadership (Assembly Speaker, Whip, Floor Leader, Caucus Chair). What issues are they most interested in? What committees do they sit on?
- Discover if anyone in your group has something in common with your legislator—it can be a good conversation starter. Perhaps you belong to the same civic organization, or you went to the same community college.
- You can find out all of this and more at www.senate.ca.gov or www.assembly.ca.gov

Organize your delegation

- Delegations should be absolutely no more than four people. Two is best.
- Determine which role each person will play:
 - **The Facilitator:** This person will announce your arrival to the secretary when you walk into the office, introduce themselves and the other members of the delegation to the legislative staff and/or member. They have the delicate but critical role of keeping the conversation on point, and wrapping things up when it is time to leave.
 - **The Recorder:** This person will note the responses and requests (if any) of legislative staff and/or members.
 - **The Personal Storyteller:** This person will illustrate the facts by giving a quick personal story that illustrates the issues in very real terms. Personal stories should be emotional without being whiny, and should tie directly back to the main message.
- Practice as a group. (Even if it is on the plane or in the car on the way to Sacramento!) Role-play what you are going to say, and how you are going to transition from one topic to the next. You will be infinitely more comfortable if you rehearse aloud, and have a game plan worked out amongst your small group before you step into the room.
- Have a five-minute rap and a ten-minute rap prepared, because you don't know how much time you will actually get!

Bring the Appropriate Gear

- Bring a note pad, pen/pencil, a fact sheet or letter to leave behind and your contact information.
- Wear business professional clothing and comfortable polished shoes. Women should wear skirts or slacks; men should wear ties and jackets. When in doubt, opt for dark shades and the best fit—and use an iron!
- If you are lobbying multiple legislators in the state capitol, remember to bring your schedule of appointments. It should include the names of the legislative staff and members you have appointments meeting with, and the time of your meetings. Room numbers are posted in the elevators, and directories are available on each floor of the capitol, just outside the elevators.



Seven Steps to A Successful Lobby Visit

1. Identify Yourself and the Group You Represent

“Hello, my name is _____ and I am a member of California Common Cause.”

2. Be Prepared to Control the Meeting

Before your appointment, select someone in your delegation to be the facilitator. Remember this is your meeting. Don't let the member get off track or control the agenda. Have the facilitator decide who will speak, when and who should cover what points. Remember that you may only have 10-15 minutes to present your case, so you will need to be efficient and prepared.

3. State Your Position Clearly

Once you have introduced your delegation, explain your position on the issue. Be sure to use clear arguments and statistics to support your position. Personalize the issue and draw on your own experiences to illustrate your points.

4. Ask Specific Questions

It is important that you are prepared enough to ask the correct question of the member. Be sure you know what you want from the meeting, whether it is support for a specific issue, a vote against a certain bill, etc. Again, be polite but firm. It is your right to ask your elected officials their position on the issues. If you disagree with their position, be prepared to say so without being rude or condescending.

5. Provide Information

Always try to leave a “one-pager” behind such as a fact sheet or letter stating your issues. This ensures that the member and staff will know your position when you leave. During the meeting, be as informative as possible, but never speculate about facts. If you don't know the answer to a question, say so. If it's something you can find out, promise to do so as soon as possible. Don't assume your member already knows your position, or have taken a position themselves.

6. Follow Up

Send a note card or letter restating your position and thanking the member for his/her time. Also, include any information that you promised to follow-up on in the meeting.

7. Debrief

Be sure to touch base with the members of your groups to reflect on what went well and what you will improve in the future. Together you can think of ways that you can continue to build a relationship with the member. Organize a campaign and continue to pressure your member if s/he is shaky on the issue. And of course be sure to let us know how the meeting went!

Sample Agenda

- A. Introductions, including your names and organization affiliations
- B. Discussion of the problem and your presentation of the fact sheet
 - Personal stories
 - Presentation of the solution
 - Ask for legislators support
- C. Thank you and departure



Protocol for Legislative Meetings

- **Be on time or early.**
- **Turn your cell phone off.**
- **Do not lie.** Most people do not go into a legislator's office with the intention of lying. But when asked a question that they think they should know, some of us try to make something up or guess at the facts. This is the quickest way to lose credibility. If you don't know the answer, simply say, "I don't know, but I'll find out and get back to you." And then be absolutely sure to follow up.
- **Stay on message.** The message is the arguments and facts that are being used to communicate the position.
- **Schedules change unexpectedly.** Be sure to confirm your appointments before a day or two before. If a scheduler or staffer asks to move your appointment, your flexibility will be appreciated.
- **Staff and members expect you to give them your rap.** After you exchange introductions, feel free to launch right into your message and personal stories.
- **The size of your delegation will determine the dynamics of your meeting.** Large groups make politicians and legislative staff feel like they have to entertain a group of tourists; smaller groups lend themselves to more intimate, sincere conversation about important issues and your concerns as constituents.
- **State positions clearly and directly.** Capitol staff can be more cynical than district office staff, but everyone will respect your conviction and understand that you represent a particular point of interest.
- **Keep the conversation non-partisan.** Avoid talking about electoral politics. Talking about whom you voted for, your assessment of candidates in a race, or anything along those lines should be avoided.
- **Keep it short. Seriously.** No matter how well your meeting is going, be mindful of the clock. Be sure to wrap up by thanking the legislator for his or her time.
- **Memorize your introductions and first few sentences.** This will prevent awkward silences, enhance your confidence and smooth out your delivery.
- **Meeting with staff is as good as meeting with members, if not better.** Staff does most of the work and advises members when the issues come up for a vote.
- **Do not get trapped into agreeing to false dichotomies** about a trade off between higher education and any other state programs. Legislators face tough decisions in managing the state's massive budget deficit. Anyone who tries to put decisions off on you is having a bad day. The reality is that legislators will weigh the competing interests in their district before making any decision. That is their job. Your role is to tell them, unequivocally, why you think higher education should be their priority.
- **Relax and have fun.** A positive, open attitude will help you to make meaningful and lasting connections with people.



Five tips for communicating with a decision maker:

1. **Tell them what you want.** They have to know what you want them to do.
2. **Tell them what the problem is.** They need to know why some sort of action needs to take place.
3. **Tell them how it affects you personal.** Bring up your personal stories of how the problem impacts your life.
4. **Tell them what will happen if the problem isn't fixed.** What are the consequences?
5. **Tell them what you want.** They can't do anything about the problem if you don't help them know what you want.