

Practical Tips to Prepare for a Visit with Elected Officials

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1. Decide who you are going to visit. In addition to your own legislator, you may want to speak with the Chair and/or other members of the committee that has oversight responsibilities for your issue(s). Or you may need to speak with the leader of the legislative body, if they have power in determining what issues come up for a vote. You may want to meet with the governor or mayor.

Sometimes when you call up for an appointment, the legislator is not available. (It's rare that you will get to meet directly with the Governor or U.S. Senator!) You then want to meet with the appropriate aide. If your target issue is healthcare reform, you will ask to meet with the aide who handles that issue. Don't be disappointed if you "only" get to meet with the aide. Legislators and executives rely very heavily on their aides, who often do the real work of reviewing bills and drafting positions. Meeting with aides and developing relationships with them is just as important as meeting with the legislators.

2. Establish your agenda and goals. What do you want to talk about? Are you going to support or oppose legislation that has already been introduced, or are you asking the legislator to introduce new legislation? What are your reasons for your position? Are you trying to get the legislator to vote a particular way, or to persuade his/her fellow legislators to vote that way, too? Are you trying to find out the legislator's views, or what the chances of passage are for a particular bill? You also need to find out how this legislator has voted on this issue in the past. Are they likely to be supportive of your position? Are they personally affected (for example, do they have a child with special healthcare needs)? This information will help you decide exactly what you want to say and what you think you will be able to accomplish. Allow time for small talk at the beginning, but not too much.

3. Plan your visit. When are you going to visit? Are you going to visit the legislator in the capital, when the legislature is in session? Or would you prefer to visit the legislator when they are in their home office in their district? Is there a particular time that you need to visit, for example, before the bill will be voted on in committee?

4. Determine the group composition. It helps to go along with someone more experienced the first few times. It won't seem so intimidating, and having someone else doing the talking helps a lot. Much of learning involves watching (and imitating) others. Advocacy is no different.

There are several important things to keep in mind when deciding who is going to visit the legislator with you. Legislators are more likely to meet with your group if it includes at least one person who lives in their district – one of their immediate constituents. It can be helpful

to include someone who has met the legislator before. You don't want a group that is too big – 4 or 5 people is the maximum number for an effective meeting – but you do want a group that is representative of your issue. Try to include someone who might not be seen as a natural ally. (It can be very helpful to bring a supportive senior citizen to a meeting where you are asking for more funding for healthcare navigators for children with special healthcare needs since a senior citizen isn't perceived as having a “vested interest” in programs for children.) Use your group composition to combat stereotypes, for example, by bringing self-advocates.

5. Listen well. A visit to a legislator can be very informative. The legislator's response to your issue and the points you are making can tell you about more effective approaches, the positions that your “enemies” are taking and what you need to do to combat them, where you do and don't have support, and what your chances are. Remember that legislators are people. They don't like to be lectured at, talked over, interrupted, or iced out of the conversation. If you listen well to them, they are more likely to listen well to you.

6. Be prepared, but don't feel that everyone needs to be an expert. When you meet with a legislator, you want to have a good understanding of your issue. But you don't have to present a doctoral dissertation on the subject! Remember that most elected officials are “generalists.” They probably don't know all the ins and outs of the issue. Don't be afraid of being asked something you can't answer. And if you *are* asked something you can't answer? Simple. Do as the politicians do: say you don't know, but you'll find out and get back to them. Don't try to bluff or fake it. “That's a very good question, Senator. We hadn't considered that issue before, but we will. And we'll get back to you very soon with our thoughts.” Then make sure you do!

It's a good idea to be able to talk about the issue in “expert” terms (statistics, for example) as well as “authentic” terms (actual impact on real people, individual stories, etc.) If the issue is complicated, you may want to divide up the various parts among the people who will be on the visit. You may introduce the topic and give an overview of why it's important to your group. Someone else may give a few key statistics and the results of any studies that have been done. Another person in your group may tell their real-life story. Someone else may give a few other examples of how people in your group have been affected. Another group member may ask the legislator for a commitment to vote a certain way, or to introduce legislation. Be open to counter-arguments, but don't get stuck on them. Don't be argumentative or confrontational. Finally, you or someone else closes the meeting by thanking the legislator for meeting with you.

Be prepared to have less time than you think to talk to the legislator or their aide. Prepare for two meetings – the 20-minute one you think you are going to have, and the 10-minute one you may end up with. Prioritize what you want to say, so you can easily switch to the shorter version if needed. It's helpful to have a summary of your points in writing so you can hand it to

them even if you don't get to talk about all of them in person. It can also be beneficial to bring letters or support statements from others who could not attend the meeting. It's a good idea to practice or role-play before your visit, especially if you are a novice.

7. Don't get intimidated, frustrated, or blow your stack. Legislators are very busy people. You may have to wait past your scheduled meeting time to get into the legislator's office. They may receive an urgent phone call, or even a call to go to the floor for a vote, while you are in their office. They may say something that you find offensive. You need to be prepared to take all of these things in your stride. If the meeting starts late, go to your shorter agenda. If the meeting is interrupted and the legislator has to leave, ask if you can continue to meet with the aide. (The legislator is likely to have the relevant aide at the meeting already). If not, ask if you can reschedule the meeting in the very near future. The answer is likely to be yes. If the legislator starts spouting offensive statements, or speaking impolitely to anyone in your group, you should politely but firmly let them know how offensive they are being. "I know it's not your intention, Congressman, but that statement is hurtful to our group. Let me tell you why." You can use these challenges as opportunities to educate the legislator. Blowing your stack will just get you escorted out of the office, never to be invited back!

8. Be on time, and don't stay too long. Be respectful of all the demands on the legislator's time, and don't be late or overstay your welcome. If you are late, you may find that they have moved on to someone or something else. Also remember that legislators and executives have lots on their plate, and limited attention span on any one issue (unless it's a real hot topic at the moment). Give them your key points, demonstrate your commitment and the strength of your movement, get an idea of their position and reasoning, and let them know that you are not going away. Once that has been accomplished, you've achieved your goals.

9. Remember you are there to build a relationship. It's very seldom that you will meet a legislator or executive who agrees with you - or disagrees with you - on every issue. There are no permanent friends or permanent enemies in public policy advocacy. The same person who voted for welfare "reform" may also be a strong supporter of quality job training, child care, and transportation to help people transitioning from welfare to actually be able to get and keep good jobs. No visit is a one-shot deal; each visit is just one of many. Try to get closure on your issue. If you hear what you had hoped for, express your thanks and leave. If you reach an impasse, thank her/him, even if disappointed, and say so. Leave room to continue the discussion at another time. You may find that the more information and ideas you bring to the legislator, the more receptive s/he is. The more they get to know you and your group, the more they will come to understand your issues and respect your commitment. Then they will naturally reach out to you when those issues are being discussed and they are trying to develop their positions. The more you get to know individual legislators, the better equipped you will be to persuade them.

10. Follow-up is important. Send a brief thank-you note to the legislator, their aide, whoever met with you. Forward any information you promised, or other information that is relevant to your discussion. If commitments were made in the meeting, repeat your understanding of them. Invite them to come speak to your group. Let them know about your activities, forums, trainings, conferences, studies, etc. Keep them informed. Even if they don't read the information right away, it will get put in their folder on that issue, and when they have to consider their position, it will be there to influence them. Keep track of their actions, too. Let them know if they disappoint you by the way they vote. But also let them know you appreciate them when they vote in favor of your position! Remember that they will be hearing from people on the other side of the issue, too!

Lobbying Rules for Non-Profit Organizations

If you are a tax-exempt, non-profit organization, members, constituents, and supporters can deduct their contributions to your organization.

Federal tax laws *do* allow non-profits to engage in legislative lobbying consistent with their mission and by-laws, and to educate the general public and policy makers about your positions. (Advocating the adoption or rejection of regulations is not lobbying). Your group is attempting to influence legislation ("lobbying") if you either:

- Contact or urge the public to contact members of a legislative body for the purpose of proposing, supporting, or opposing specific legislation; or
- Advocate the adoption or rejection of specific legislation.

But there are limits on how much money you can spend on legislative efforts. If you wish to lobby, your non-profit group must choose one of the following:

- You must not spend "a substantial" amount of money on lobbying; or
- You make an IRS election to spend no more than 20% of your funds on lobbying.

Most foundations and all government agencies prohibit the use of their funds for lobbying. So the amount of money you can spend on lobbying is limited both by IRS regulations and by the amount of unrestricted money you can raise (for example, through membership dues, sale of materials, private donors who do not deduct their contributions from their taxes, etc.) A helpful resource to understand the limits on lobbying is the Alliance for Justice, www.afj.org. For more information, listen to the archived teleconference and review the materials on lobbying for non-profits on the Family Voices website at www.familyvoices.org.

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