



## **Helpful Guidelines for the Lobbying Process**

### ***PLANNING***

#### **Match your goals and objectives to those of the legislator or regulator**

- Ensure your clients' needs goals and objectives have been vetted and match the goals, objectives, background and passions of the legislator/regulator
- Frame your facts so that they speak to the priorities of the legislator/regulator
- Help them solve a problem or address a policy priority. Do a "Jerry Maguire" -help them help you.

#### **Requesting meetings**

- Proper timing is key. Request meetings about two weeks before the desired date. Too far in advance, schedules change. Too close to the meeting, there's no room on the schedule.
- Ensure that meeting requests contain pertinent information. If you are a constituent of the legislator, this information should be up front. Also, include a description of the project or issue.

### ***MANAGING EXPECTATIONS***

#### **Be Flexible**

- Arrive early or at the latest, on time. Realize the people you are meeting with may be late, or have to move or cancel the meeting at the last minute.
- You may end up meeting in a hall way or lobby. Be flexible. The meeting location is not a reflection of your importance. As long as they are giving you their time, that's all you can ask.
- Be courteous. The staffer or member may be distracted or unfamiliar with the issue/project. This is your opportunity to build a relationship. Never squander it even though the meeting conditions may not be ideal.
- Understand that most likely you will not be meeting with the legislator. The majority of time, you'll meet with a member of staff. These people are the policy experts. You've got to convince them or your issues will die on the vine.

### ***MEETING WITH LEGISLATORS OR REGULATORS***

#### **Vote with Your Feet**

- It's important that the actual client/project developer come to Washington. The member sees that you've taken valuable time away from your business or project to come speak with them. There's only so much your lobbyist can say on your behalf.

### **Be Your Own Best Advocate**

- Remember that it's your job to advocate for your position. The other side has their advocate, too. You're not supposed to work for the other side. They'll have their opportunity.
- Look at this as an opportunity to educate your legislator or regulator. They can't know everything. You are helping them do their job.

### **Be Honest**

- Don't make stuff up. People appreciate honesty. If you don't know an answer to a question, say so and circle back around to them with information if you can. Always be truthful.

### **Make it Local**

- Remember, as Tip O'Neil said, "All politics are Local." Make the project/request resonate with the member. Talk about how your project will affect the district.

### **Have an "Ask"**

- Always have a concrete reason why you are asking to meet with the legislator/regulator. As part of your planning process, figure out what you are asking them to do.

### **Develop "Leave Behinds"**

- Have collateral material developed for the meeting. Use two or three pages as a guideline. Any more and the staffer/member will not read it. Bring letters of request and support if you have them. If you don't, ensure to submit them later.

### **Always Say Please and Thank You**

- Its like your mother told you, a little courtesy goes a long. Always frame your "ask" as a request. Always thank the people with whom you are meeting both during the meeting and afterwards with an email or letter. Not only is this the proper thing to do but it also gives you an additional reason to touch base with them and keep in contact.

## ***LEGISLATION***

### **Stand Alone Bills Rarely Pass**

- Look for ways to work with others and look for larger "must pass" bills where you could "place" your legislative ask.

### **Build a Broad Basis of Support for Your Effort**

- Try to build support for the legislation from a local level. Work all constituencies. Assemble a coalition of partners who support your project. Make it easy to say "yes" and hard to say "no"

### **It's a Marathon, Not a Race**

- Be Realistic. Understand that passing legislation, even something that has bipartisan support, can take a long time. Less popular ideas can take far longer to pass.

### **Don't Get Discouraged**

- It may be a long difficult road but like anything else we value, seeing legislation come to fruition takes effort. Don't give up.

## Lobbying the Legislature

By Dan Bosley\*, January 3, 2013

Decision makers are only as good as the information they have. Therefore it is important that we educate and advocate our positions. As smart as a legislator may be, they are generalists in most cases and don't have the knowledge or experience in your field that you do.

In Judy Meredith's book, "*Lobbying on a Shoestring*", she has two general rules:

- 1) Lobbying is getting the right information to the right people at the right time.
- 2) Elected officials make different decisions when they know they are being watched by the affected constituency.

Here are some simple guidelines to follow when lobbying a legislator or member of the administration.

**First and Foremost, Start Early and Stay Engaged.** You can't come into a process at the last minute. Issues that you care about may have already been resolved at that point. Start early and make sure that you have a plan as to what you need out of a meeting or particular piece of legislation. You have to become a part of the process in order to be part of the outcome.

**Second, Honesty is the Best Policy.** Don't stretch the truth to make a point. Your opponents will be very happy to point that out. Legislators' words are their stock in trade. You can't recover from straying from the truth. If you don't know a fact or some information they are looking for, tell them you don't know but will find out and get back to them.

**Third, Follow Through.** Again, have a plan and keep to it. Make a list and check it twice, just like Santa. If you tell a legislator that you will get back with more info, get back. If you hear of a development or if someone puts out information you do not agree with, call your legislator. There are dozens of issues before a policy maker at any one time and many competing interests. You need to stay engaged and follow through. Things will lose priority or will fall through the cracks if you don't. The best way to describe this is a conversation that I had with Dick Manley, former head of the Mass. Taxpayers Foundation. I assured him that if a certain legislator had given him his word that the issue in question would be taken care of. Dick told me that it wasn't the legislator's word that he was worried about, it was his memory. Always follow through!

**Four, Do Your Homework.** I wrote earlier that you will know more about your business than the legislator in many cases. However, they will know process and will have talked to many others about your issue. Make sure you are prepared to answer their questions. Remember, you are competing for a policy maker's time. His time is limited and your time is expensive. Use it well by being prepared.

**Five, In Meetings, Be Brief.** If you have done your homework, you can be precise and make your points in a short time. You are competing for a decision maker's time and you mustn't ramble but must come to the point before your time is up. Also, don't feel that you need to rebut any point made by the legislator in a meeting. You can always follow up with a written response and more documentation if need be, but don't try to debate the bill or issue right then and there.

**Six, Wherever Possible, Use Humor to Make Your Point.** This is just a personal observation. First, far too many people come into a legislator's office with a very serious

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look on their face and drone on about their issue. The purpose of a meeting isn't to lecture a policy maker, but to exchange information. Don't lecture, but tell a story. And as in life, we all enjoy a little humor. Second, it is very hard to say no to someone with a smile on one's face. That said, don't build your case on humor. Be factual, but a little levity sometimes is remembered more than the issue itself.

**Seven, Give out Written Materials.** Long after your visit is over, your written material will give legislators an education or the real facts on your issue. That is important. Many times, an issue comes to the floor long after you have been to see your local legislator. There may be hundreds of other issues that have occupied their time since your visit. The written material that you leave behind is an important reference as well as a refresher on the subject.

**Eight, Build Consensus.** Legislation is a process. There are many discussions and decision makers needs facts and want to know how they can achieve a policy goals while making as many people as possible happy (or at least satisfied) with the result. Find like-minded legislators or examples where similar policy is used to forge a consensus around your ideas or goals.

**Nine, Personalize Your Subject or Goal.** Statistics and a mountain of data are important to state your case, but in the end, the policy maker will remember your arguments if they are important to him/her and their constituents. Make sure that they understand that a health care program isn't just to streamline our system but is to help an individual struggling with a debilitating disease, or a tax break isn't about padding a business bottom line, but puts local people to work by creating more jobs. And that leads to:

**Ten, Local Lobbying is Almost Always the Best Lobbying.** If your policy maker knows that Mrs. Smith in his/her district can now send her kids to school using a lunch program that will ensure they will be fed, that will resonate much more than a page of statistics on the impact of under nutrition on learning in our school systems. Local legislators have to be elected by their constituents. They need to know how your initiative or issue will help his local people. Put a human face on the statistics and wherever possible, use local examples of the benefits of your issue.

There are other points that one can make on lobbying. For example, mobilize your base so that same-minded groups on this issue are prepared to help lobby your point of view. Along this line, you need to assess your opposition. Know what they are saying so that you can rebut it or provide more info on your point of view. Another point is using but not overusing the media. If an issue is publicized, decision makers may feel that people have prioritized this issue and they need to act. That said, an overuse of the media may make a legislator feel that they are being pressured on an issue and that can backfire on the advocates. However, these are different issues for another day. The top ten rules above are for lobbying an individual legislator. Good luck!