



HOW TO Have a Successful Lobby Meeting

WHY LOBBY?

There's a lot of skepticism about getting involved in the legislative process today. Many people think that "money talks" and little else matters. Campaign contributions are important to politicians, and special interests do have significant influence, but they are not everything. The voices of constituents acting alone or in groups are often very powerful. Local people see the problems in their communities first hand, and can offer creative solutions; they can build strong relationships with public officials and wield significant influence – especially as leaders of powerful organizations.

In other words, you can make a difference. Our nation's history has countless examples of grassroots advocacy leading to lasting change – from ending slavery and securing the right to vote for women and minorities, to the minimum wage and the environmental movement.

Face-to-face meetings to lobby public officials, whether elected representatives or appointed administrators, are just one part of that process. These meetings can occur at the local, state, national or even international levels. Congressional and agency meetings may sometimes be with staff instead of or in addition to the officials themselves. However, many of the same guidelines hold true for all lobby meetings, regardless of who you are meeting with.

“The job of a citizen is to keep his mouth open.”
—Gunther Grass

ALWAYS REMEMBER WHAT YOU'RE TRYING TO ACCOMPLISH

MAKE A CONNECTION

Successful lobbying is built on relationships. You want the official or staff person to remember you and come to you and your organization for information and advice. Take the time get to know the person you are meeting with and let them get to know you. Find out where they are from, what their background is, how long they have been in this position and other details that help you understand their perspective.

TELL YOUR STORY

One of the best ways to make a connection and have a meeting that makes an impression is by telling your personal story to make the issue you are talking about more real. Use photos, maps and other visuals to paint a picture.

LISTEN AND LEARN

Your job is to get information as well as to persuade. Don't dominate the conversation. If the official or staff person is not asking questions, offering opinions and participating in the conversation, draw them out by asking questions of them and giving them time to speak.

FIND A PATH FORWARD

Once an official or staff person is on board with your issue or concern, engage their expertise to find the best way to reach your goal. For example, your plan to introduce a bill may not be



the best way to get the outcome you want if the official has the opportunity to get a funding increase, offer an amendment, or request an administrative policy change instead.

LEAVE WITH SOMETHING

Try to get a commitment for something. Sometimes, the main goal is to educate, but you should also always think ahead of time what the official can do – whether it is to vote a certain way, introduce an amendment, sponsor a bill, write or sign a letter, help arrange a meeting with another decision-maker, write an opinion piece for the newspaper, or help you get information. If nothing else, get a sense of what useful information you can provide and a commitment on when you should follow up or meet again.

PREPARE FOR YOUR MEETINGS

DO YOUR HOMEWORK AHEAD OF TIME

Get as much information as you can about the people you'll be meeting with: What is their background? For legislators, what are their voting records on issues related to what you want to talk about? Have they introduced similar legislation? Are they on key committees of jurisdiction? You'll also want to know about the process to reach your goal. For example, if you're lobbying on a bill or proposed rule, what is the process and status, and what is the timeline?

CRAFT YOUR MESSAGE

Write down your message ahead of time. Draft a "rap" that includes the important points and strongest arguments that you want to make in every meeting, as well as what you want to ask.

THEN, TAILOR YOUR MESSAGE

Think carefully about what messages are likely to work best with each individual you are meeting with, and be prepared to adjust accordingly. Think about what messages aren't likely to work well, too, and should be avoided. Some folks have a tendency to want to demonstrate everything they know or speak their minds freely, which can be counter-productive.

REVIEW AND ASSIGN ROLES.

If you're lobbying with a team, review your message together

to make sure you are all agreed, and decide who will say what. It's a good idea to have one person serve as a facilitator who will be in charge of keeping the meeting on track -- someone who is assertive and disciplined. Another person should listen carefully, paying attention to how your arguments are being received and what the official has to say, and asking clarifying questions if needed. At least one person should take notes.

PRACTICE

Say your message out loud at least once, especially if you're lobbying with a team. Then, make sure that each member of the team has the chance to offer their input -- which messages come across well, and what needs to be more clear?

MATERIALS HELP MAKE YOUR CASE

Bring a few visuals that help tell your story, such as photos or maps. It is always helpful to have a short factsheet (one page is best), a question-answer sheet that responds to your opposition's arguments and a business card with your contact information. You also might want to have a copy of any bills, amendments, existing laws or regulations you're lobbying on, one or two of the best press clippings on the issue, and a letter or other document that shows which organizations support your position.

MAKING YOUR CASE

APPEAL TO SELF-INTEREST

Be sure to explain how your issue will affect the official's home district or issues he or she is concerned about, but discuss their personal self-interest (such as how the issue will affect their chances of re-election) with caution. Many politicians will stop listening if you suggest that they're more concerned about their career than about what is right.

STICK TO THE FACTS

Never forget the straight out appeal to reason and common sense, but bear in mind that what seems perfectly straightforward and reasonable to you may seem misguided to a person with different beliefs.

APPEAL TO IDEOLOGY

When you know that an official adheres to a particular political philosophy, it might be useful to frame your issue in terms of the tenets of that philosophy. But don't try to bend his or her beliefs too far to fit your case, especially if you do not share those beliefs.

DON'TS:

Some basic rules that you should never violate:

NEVER LIE

Be scrupulous about facts. Your credibility is gone as soon as you say something an official knows is not true. If you make an error, correct it as soon as possible.

NEVER MAKE A THREAT

You should hold officials accountable for their actions, but it won't help your cause to threaten that they'll never win re-election, for example.

DON'T MAKE IT PERSONAL, OR TAKE IT PERSONALLY

Always be professional. It's okay to be passionate, but draw the line at hysteria or shouting.

PREPARE FOR YOUR MEETINGS *(continued)*

ANTICIPATE TOUGH QUESTIONS

Review your opposition's message and develop your best rebuttal. Brainstorm other questions you might be asked and have your responses ready.

REVIEW YOUR AGENDA

Take a few minutes right before each meeting to review the specific agenda for that meeting and what you know about the person you're meeting with, especially if you're lobbying with a team.

PREPARE TO RUN INTO PEOPLE YOU HADN'T PLANNED TO MEET WITH.

It's not uncommon to see public officials in offices, hallways and cafeterias, and it's perfectly acceptable to introduce yourself and tell them why you're here. Prepare a short "elevator speech" for chance sightings.

HAVE A GREAT LOBBY MEETING

BE ON TIME

Bring a phone number in case you're running more than a few minutes late. But, don't be surprised if their schedule changes and they need to shift the meeting place or time. Legislative schedules are subject to last minute changes, and it's sometimes necessary to be flexible.

INTRODUCTIONS ARE IMPORTANT

Don't forget to explain where you're from, why you're here, what organization you represent, and what issue you want to cover.

START POSITIVELY AND WITH A THANK YOU

If this official has taken a helpful action, be sure to thank them. If nothing else, you can thank them for taking the time to meet, especially if they have not always been on your side of the issue.

ASSESS WHAT THEY KNOW

Officials and their staff won't always tell you if they don't know what you're talking about, so it's important to assess their knowledge level at the beginning of the meeting. One way to do this is to ask outright what they know. Keep in mind, however, that even a policy expert may not have a good understanding of how people are affected by an issue, so it is always useful to tell your story.



GET DOWN TO BUSINESS

Sometimes small talk can help build a relationship or establish your credibility, but don't spend too much time chatting about the weather or the home team's football game. This is particularly true with members of Congress who may be with you for just a few minutes.

LET THEM TALK, AND LISTEN CAREFULLY

Remember to leave time for the official or staff person to talk. If needed, ask questions to get them started, such as what they already know about this issue, what they are hearing about it from their constituents, or whether they have a position already.

DON'T FORGET YOUR "ASK," AND GET AN ANSWER

Politicians are expert at sounding like they're giving you what you want. Always ask for their support, even if they sound like they won't support you, but especially if they sound like they do. Ask a direct question. Wait for an answer, even if it means sitting through a silence. If they don't answer, rephrase your question. You may not want to push for an immediate "yes" or "no" answer if they're not ready to commit, but you should find out why they aren't ready to commit. What more information can you get them?

DON'T BE AFRAID TO SAY "I DON'T KNOW"

During your visit, you may encounter questions that you cannot answer. It's much better to admit you don't know the answer than it is to provide information that may not be accurate. Instead, you can research the issue then get back in touch with the information requested. Legislators will appreciate your honesty, your willingness to find an answer to their questions, and your commitment to the issue.

HAVE A GREAT LOBBY MEETING *(continued)*

TAKE NOTES

Don't be afraid to take notes to help you remember key points made during the meeting, but think about whether someone should try to write down everything that is said or not. It can be helpful to have thorough notes after the meeting is over, but it is sometimes disconcerting to officials to have someone scribbling down every word they say.

BE CLEAR ON FOLLOW UP

At the end of the meeting, tell them what you will do and what you understand they have agreed to. Make a proposal for how and when you will follow up and what you expect from them, and ask whether they agree.

TAKE A CARD

Feel free to ask for a business card to make sure you have the person's contact information, the correct spelling of their name, and their title.

AFTER THE MEETING

EVALUATE

Evaluate your meetings with your team when you're done, especially the first few. Give each other feedback on what was effective, what seemed confusing, and what you can do better next time.

FILL OUT REPORT FORMS AS SOON AS POSSIBLE

Good reports ensure that the lobby team agrees on what occurred during the meeting, that coalition members who were not present will be informed, and that follow up occurs. It's much more effective to do this right after each meeting rather than waiting until later, and it's helpful to involve the entire



team, rather than relying on one person to fill in the form. If you don't have a form, make sure you have detailed notes.

DECIDE WHAT TO SHARE

Give careful consideration to what you want to share with other officials and staff, the media, and anyone else who was not in your meeting. There are pros and cons to "going public" that should be thought through and agreed on by the entire team.

FULFILL COMMITMENTS

Be clear on what the follow up steps are, and who is doing what – then do it!

KEEP THE LINES OF COMMUNICATION OPEN

Now that you've established a relationship, it's important to stay in touch. It's a great idea to start with a thank you note, but don't stop there. Send information to keep officials and their staff up-to-date as your campaign progresses. And don't be afraid to be the squeaky wheel – if they agreed to do something for you, follow up to make sure your request doesn't get forgotten.

THE MEETING IS JUST THE BEGINNING

An effective lobby meeting is one component of a successful lobbying effort, but it's just the beginning.



WORC is a network of grassroots organizations from seven states that include 10,000 members and 38 local community groups. WORC helps its members succeed by providing training and by coordinating regional issue campaigns.

WORC's Network

Dakota Resource Council
Dakota Rural Action
Idaho Organization of Resource Councils
Northern Plains Resource Council
Oregon Rural Action
Powder River Basin Resource Council
Western Colorado Congress

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FOR MORE ON LEADERSHIP:

Principles of Community Organizing training sessions are held annually by WORC. **Advanced Leadership and Staff Development** training sessions are also held by WORC.

How to Influence Public Officials and How to Hold an Accountability Session are other topics available in this series of guides to community organizing.

MORE HOW TO GUIDES:

WORC has produced a series of How To's, practical guides to assist members, staff, leaders and citizens to build strong organizations and win their issues.

Topics are listed on our website – www.worc.org. These publications can be downloaded from the website as PDFs or ordered for \$2 each. Contact WORC regarding bulk orders or about training sessions on topics in this series.

