

The Lobbying Process: Basics and How-To Guide



Lobbying and direct contact with policymakers are critical components of an advocacy campaign and can be instrumental in achieving the desired policy change. Lobbying refers to asking an elected official or key decision-maker to vote a certain way or take a specific stand on a piece of legislation, rule, issue or policy. One of the most persuasive forms of lobbying is a face-to-face meeting with your elected officials or her/his staff about the issue at stake, why you are passionate about the issue, and the position you'd like your member of Congress to take.

It's important to remember that lobbying is part of a comprehensive strategy to win on your issue or achieve the policy change you want. Lobbying builds relationships with elected officials and educates them, develops leaders and their credibility within your organization or network, and sets the stage for ongoing advocacy. Lobbying also serves as a complement to network- or base-building and media advocacy – all three strategies work together to create a successful advocacy campaign.

Meeting with your elected official does not have to be an intimidating process. After all, you hold a great deal of influence as a constituent! Below are some helpful tips to help you navigate the lobbying process.

Before the Meeting

Research the Issue and Lawmaker

Before setting up a meeting, it is important to make sure you have done your homework about the issue at stake and the elected official you would like to meet with in person. Some questions to consider include:

Issue questions

- Is lobbying the appropriate action for your campaign? Which public body is making the decision (e.g. Congress, Administration)?
- Who are the key decision-makers (e.g. committee chairs or members, caucus leaders, party leadership)?
- When is the issue or legislation coming up for a hearing or vote?
- Who is lobbying in support of the issue and who is lobbying against the issue? What are their arguments and messages?

Lawmaker questions

- Does your elected official generally support or oppose your issue?
- What is your lawmaker's voting record on the issue at stake or on similar issues? A good resource for voting records and issue ratings is Project Vote Smart: www.votesmart.org.
- If you are meeting about a specific piece of legislation, is your elected official a co-sponsor? This information can be located by visiting the Library of Congress website - <http://thomas.loc.gov> and entering the bill name or number and clicking on the co-sponsor list.
- What other background information would be useful in crafting your messages and your "ask?" This may include your legislator's party affiliation, whether your lawmaker is a "champion" on certain issues, the demographics of his or her district, and whether s/he is up for re-election.

Schedule the Meeting with your Elected Official

Most legislators are eager to meet with their constituents – your opinions are valuable! Keep in mind that you do not need to be an expert to get your point across. Brief background about the issue, a personal story and a clear “ask” is more powerful than presenting a ten-point plan or a litany of facts. There is also power in numbers – setting up a meeting along with 3-4 like-minded individuals can help showcase even stronger support for your issue.

Meetings with legislators or their staff can be scheduled at the district level or at their offices in Washington, D.C. Members of Congress typically like to use recess periods to spend time in their districts, which presents a perfect opportunity to set up a meeting close to home. Alternatively, members of Congress are impressed by constituents who are willing to make a personal visit to their Washington, D.C. office.

To request a meeting with your Senators or Representative

- Call the U.S. Senate Switchboard at 202.224.3121 or the U.S. House Switchboard at 202.225.3121. District telephone numbers can be found on your elected official’s personal websites or in your local telephone book.
- Ask to speak with the scheduler or appointments secretary, introduce yourself as a constituent, and mention where you live.
- Tell the scheduler which issue or legislation you would like to discuss with your elected official and request a meeting (usually 15-30 minutes). It is not uncommon to only receive a 10-15 minute appointment.
- If you cannot meet directly with your member of Congress, you can schedule an appointment with the legislative aide responsible for your issues.
- Be sure to send a follow-up letter or email confirming your appointment. Your follow-up letter should contain your name, address, and daytime phone number.

Finalize Pre-Meeting Details

If you are meeting with your elected official in a small coalition, it is important to determine prior to the meeting who your spokesperson or lead speaker will be, who will answer specific questions, who will take notes, and who will write a follow-up thank you letter.

Regardless of whether you are meeting with your legislator by yourself or with a group, you should be clear about:

- Your message
- The resources you want to leave behind
- Your ultimate “ask”

It is also a good idea to practice what you want to say and how you will deal with difficult questions before the meeting takes place.



During the Meeting: Tips for Success

- Dress nicely and be on time. First impressions matter – do not let your appearance detract from your message or credibility.
- If you represent an organization, introduce yourself and tell your elected official or staff person the name and mission of your organization, where it is located and the size of its membership. If you are lobbying as an individual, be sure to introduce yourself as a constituent and to mention any family, social or business ties you may have with the legislator.
- Start with a supportive statement. For instance, if the legislator recently voted in favor of a related issue you care about, mention that. At minimum, thank your elected official for taking the time to meet with you.
- State clearly and concisely what issue you want to discuss, what your position is, and what action you want your elected official to take. Use simple, understandable terms and avoid acronyms. Offer a few supporting facts about why s/he should take your position.
- Stress how the issue will affect the member's district or state, if possible.
- Share a personal story or concrete examples that highlight your experience with the issue and why you care about it.
- Mention other organizations, influential people, government officials and lawmakers that support your position.
- Be a good listener. After you make your pitch, allow the legislator to respond. Be prepared to bring the conversation back to your message and ask if the lawmaker goes off tangent.
- Answer questions to the best of your ability. If you do not know the answer, say so. Offer to provide the information promptly in a follow-up email or letter.
- Do not forget to explicitly make your "ask." Pose a direct, yes-or-no question to which the legislator can respond. An example would be "Can we count on you to co-sponsor the bill?" Be prepared for how you will respond to your member's position. Have a plan to turn a "Yes" into a champion, an "Undecided" into a yes, and to learn from the objections of a "No."
- Give the lawmaker a "leave behind" fact sheet (1-2) pages that outlines your position, explains what the bill does (if applicable), and why s/he should support your viewpoint.
- Always thank your legislator for his/her time at the end of the meeting, even if he/she did not agree with your position.

Adapted from the One Voice Summit 2009 Advocacy Guide and Wellstone Action's "Lobbying Basics."



After the Meeting

Immediate Steps

- After the meeting, write down what happened and any information you learned about the member's position so you can share it with others and use it to develop your legislative advocacy strategy.
- Always follow up with a timely thank you letter. In the letter, reiterate your key points and any commitments the members made to you. Include all follow-up information you promised to provide.

Evaluate Legislative Advocacy Strategy

- If the elected official was a "Yes" or longtime supporter of your issue, work to cultivate him/her as a champion. Champions are important in that they can assume a leadership role in influencing other legislators. For instance, if asked your elected official might be interested in circulating a "Dear Colleague" letter to garner additional support from other lawmakers about your issue.
- If the legislator was a "Maybe," make every effort to organize grassroots advocacy efforts to swing her/his opinion or vote.
- If the legislator was a clear "No," constituent pressure may persuade her/him to be absent at the time of the vote. Regardless, do not spend significant time trying to persuade someone who is opposed to your position - your energies are better spent on convincing the "Maybes" and cultivating "Champions."

