

Planning a Successful Lobby Day

One of the most effective ways of letting elected officials know your organization's views on issues is through a personal meeting. In political terms, this is called lobbying. Lobbying provides members of Congress, state, and local officials with the information they need to make the best decisions for their constituencies. The information and education you can provide may be critical to the decisions they make on policy that affects your profession.

Elected officials take heed to mass numbers. When a group of people from an elected official's district requests a meeting regarding a particular issue, the elected official wants to hear their point of view. Most elected officials want to make sure that they understand the consequences and benefits of any particular piece of legislation on their constituency.

Because lobbying can be so valuable in getting an organization's view known, the planning and implementation of a lobby day is very important. Your success will be based on how well you organize the participants who will represent your organization's point of view. **Remember, "The appearance of power is power."** The more effectively you plan for your grassroots lobby day at the Capitol or City Hall, the more seriously the elected officials will view it.

IMPORTANT LOBBY DAY DECISIONS

Determine the date and notify potential participants

Setting your date early will ensure that your lobby day will get on the calendar of all of your members so they can plan ahead for expenses in their fiscal year budget. You will want to consider the legislative calendar and, if at the state level, make sure that the state legislature is in session.

Determine the format of your lobby day

Groups organize their lobby days in many different ways. The most traditional technique is to organize members of your organization to go to the offices of the elected officials. However, organizations have been known to have receptions or forums, at which they invite legislators to speak on particular issues and take questions.

Determine the staging/meeting location for your lobby day

This is a very important decision and will affect transportation, food and hotel decisions. If you select a venue that is not within walking distance of the legislator's offices, you will need to consider providing transportation to Capitol Hill (or State Legislature). When selecting a staging site for your lobby day activities, be sure that the location's capacity is large enough for the number of participants expected. In addition, make sure that all of the technical equipment you might need is accessible. Your location should also be accessible to people with disabilities.

Determine whether to provide lunch or snacks

Your decision to provide food for your participants always comes down to your budget. Be sure to explore many options, from purchasing gift cards for local eating establishments or locations, to asking another organization to use their facility for a lunch location.

Determine how appointments will be set

It is imperative that you determine early who will set-up the appointments.

This can be a huge undertaking for one individual; however, if appointments are set in one central location, the organization can better determine the number of members attending each appointment. Scheduling of appointments should start about 3 weeks before the lobby day. Many offices will not confirm a meeting until 1 week out. If appointments are set by participants, be sure to have them notify the organizer so that an overall schedule can be maintained.

Determine what issue(s) you will be lobbying

Because the status of legislation changes on a daily basis, it can be a challenge to select the issue(s) on which you will focus your attention. Your issue(s) have to be determined before a scheduling letter is sent to elected officials regarding the lobby day. Most offices will not set up appointments if they do not know what they will be discussing. Remember, you want to get the largest benefit from your lobby day. Legislators usually have limited time. At a meeting, the participant should educate the elected official on one or two issues and shore up his or her support. **Trying to discuss too many issues will only result in confusion and no commitment from the elected official.** Information on other issues can always be sent later.

Determine the contents of your Lobby Day Packet

In order for the participants to have a positive lobby day experience, a lobby day packet is essential to guide them through their daily meetings. Packets should include but are not limited to:

- Agenda of the day's activities
- Appointments list
- Map of office locations
- Letter from executive director or president to elected official asking them to support your issues
- Talking points on the issues
- Educational information on the issue that can be given to the elected official
- Lobby day meeting follow-up report form
- Sample thank you letter

Determine the number of volunteers you will need

Organizing a lobby day is a huge endeavor. You will benefit from enlisting the support of a few co-workers to help make phone calls, prepare materials, stuff folders, make appointments and even assist in lobbying. On the lobby day itself, the organizer will be taking care of many things that you did not anticipate. Here are some of the volunteers' roles on lobby day:

- Sign in participants and name tags
- Hand out lobby day packets
- Meet guest speakers and introduce them around the room
- Handle any technical issues, such as laptops/projectors/Power Points
- Handle the food
- Handle the transportation

Determine who will take part in your training session for lobby day

Preparing your participants for lobby day is critical. Many may have no experience in advocacy and may be unfamiliar with the issues. A pre-lobby day briefing is a good way to prepare your participants for lobbying and to answer any questions they might have. An Advocacy 101 session is recommended, followed by in-depth briefings on your issues, perhaps by experts from other organizations who may be willing to come and participate. Factor in some time for role-playing exercises to ease jitters, reiterate the dos and don'ts of lobbying, and actually practice lobbying.

Determine whether to invite the media to your lobby day

This is where the appearance of power comes into play. If you can get your local or statewide media to cover your lobby day, that can determine its success. If the media covers your lobby day and mentions the issues about which you will be meeting with legislators, pressure will be added to the legislators to support your view, especially if the media in their districts covered the lobby day. Try to use all media outlets, including television, radio, newspapers, and the Internet.

LOBBY DAY PLAN TIMELINE

Based on a four-month planning process

The date for your lobby day should already be selected. When you select a date, make sure that the legislature is in session. Once you have your date, you can begin to advertise your lobby day to your members in the newsletter, on your Web site, and at conferences.

Prepare a Lobby Day Timeline and Checklist

This can be an Excel file or basic document, but should include the projected completion date, task and person responsible. This timeline will guide you and keep you on track, so make sure you have included every task for planning purposes.

Four months out

- Determine meeting logistics and reserve your meeting room and a block of hotel rooms if applicable.
- Determine if lunch or transportation is needed and reserve chartered bus if applicable. Explore catering options and narrow choices based on budgetary constraints.
- Determine format for lobby day, whether it is a day of visiting legislators' offices or a reception, forum or briefing for legislators and staff.

90 Days Out

- Post registration information on Web site and alert invitees so that they can make travel arrangements.
- Create lobby day agenda and instructions.
- Determine your issues.
- Discuss options for special guest speakers who will speak at your training.
- Determine who will schedule appointments for lobby day.

60 Days Out

- Determine what will be in participants' folders: Lobby tips, maps of legislative building locations or city council offices; lobby report form; talking points and position papers; draft letter from executive director or president to members of congress, the state legislature, or the city council
- Draft press releases
- Determine organizational volunteers and their roles
- Invite guest speakers who will provide briefings on issues

45 Days Out

- Draft talking points and leave behinds on issues.
- Draft letter from the executive director or president that will go into the packet of information for legislators on lobby day.

30 Days Out

- Begin meeting requests via telephone, email or fax.
- If you are scheduling appointments, allow seven days and then make follow-up calls for appointments.
- Start recruiting volunteers to help with your effort.
- Order any materials you might need for lobby day such as pencils, folders, note pads, and nametags.

15 Days Out

- Prepare participant folders and mail out, if applicable.
- Prepare your meeting location and make sure that you have everything you need.
- Call people with whom you have contracts and make any last minute changes.
- Follow up on all meeting requests with legislators offices that have not yet responded. If not already started, prepare master schedule with all meetings and participants; revise as meetings are scheduled.

2 Days Out

- If applicable, send a press advisory to the media regarding the event.
- Finalize master meeting schedule.
- Prepare cell phone list.
- Confirm bus (if applicable) and lunch/catering provider (if applicable).

Day of Event

- Send a more detailed press release to the media.
- Arrive at the transportation pick up site early to greet participants.
- Plan to have extra materials in case participants want to do some “drop-by” visits at other legislator offices.

5 Days after Lobby Day

- Send thank you letters out the following week to elected officials and participants.
- Write a follow-up article for your newsletter or Website.
- Post survey and notify participants.

APPOINTMENT SETTING

Appointments may either be made in writing by faxing or emailing the legislator’s scheduling person, or by phone. Every office differs in their preferred scheduling process, so please check with them to determine which process to use. Sample language follows for emails, faxes and phone call scripts.

Sample Email or Fax

Dear [Name of Scheduler],

Members of the National Association for Sport and Physical Education will be in Washington, D.C. on [date]. We would very much appreciate a meeting with Senator [Name] and/or his Education staff person to discuss the importance of quality physical education and related legislative issues.

Among attendees will be [Insert names of participants from the Senator’s home state and their affiliation] There may be others at the meeting as well, but I am unable to confirm the names at this time.

A meeting between the hours of [times] would be ideal.

Thank you so much for your consideration of our request.

Cordially,

Phone Script

“Hello, my name is [name] from [name of organization]. May I please speak to the scheduler?” (Write down the scheduler’s name. Be sure to get the correct spelling.)

“Several of our members will be in Washington, D.C. on [date], and we would like to schedule a meeting with Senator [Name] and/or his Education staff person to discuss the importance of quality physical education and related legislative issues. May we do this on the phone, or would you prefer an email or fax?”

At this point, you may either continue, or take down the email address or fax number. Although you should make every effort to get a meeting with the legislator, many times you will be referred to the appropriate staff person, e.g., the one who handles education issues. If you are able to continue on the phone, let the scheduler know who is coming:

“At this time, the following people will be attending: [list names and affiliations]. We would like to schedule a meeting between the hours of [times].”

Note: You may have to contact the office several times before someone returns your call or confirms an appointment. Be persistent and proactive—you are calling as a voting constituent [or on behalf of voting constituents].

Appointment Report Form

The best way to keep track of appointments is with the Excel program, or something similar. Information to include in the report form:

- Name of Legislator (w/ state/district they represent)
- Name of Scheduler
- Phone number of Congressional office
- Name of staff person who may take the meeting
- Time requested/Time confirmed
- Attendees (with contact information—emails/office #/cell #)
- Meeting location
- Date appointment is confirmed and who confirmed it

LEAVE BEHINDS

A personal meeting with a legislator is the perfect opportunity to educate your elected official about your profession and organization. You do not want to overwhelm the official, but you do want him or her to leave the meeting with a better understanding of the role of your organization or profession. A one page “leave-behind” that clearly and succinctly defines the issues is probably the most important document in your packet. Try to avoid leaving behind more than 1 or 2 pages. Other materials you may consider leaving with the legislator or staff person are:

- Your organization’s Public Policy Agenda
- Your business card
- Letter from President of the organization supporting the issues

- Letters from other constituents that were not able to attend the Lobby Day asking for support for the issues

PARTICIPANT FOLDERS

Information to include in the participants' folders should include:

- Lobby day agenda/schedule, including meal instructions, if applicable
- Your organization's Public Policy Agenda
- Talking points for each issue
- Extra copies of the one-page leave-behind
- Map of Capitol Hill (or state capitol)
- Lobby Day tips
- Cell phone numbers of others in group and lobby day organizers
- Meeting Report forms

ON LOBBY DAY

For the pre-lobby day briefing, arrive at your event location 2 hours early to make sure the venue is set up as requested. Make sure that the meeting room is comfortable, roomy, has enough seating and tables, and test any electronic equipment well in advance of use. Ask your volunteers to arrive 1 hour early and position them to assist participants with directions. Also, position one of your volunteers as a greeter for your guest speakers. Collect cell phone numbers, if you don't already have them. Set up your table with folders, name tags and additional copies of important documents (maps, talking points, etc.).

On lobby day, arrive early to provide direction and ease any jitters the participants may be feeling. Check in with the transportation provider(s) to make sure they are on time.

AFTER LOBBY DAY

Evaluations/Survey

If you decide to ask your participants to complete a survey, you should prepare this within 2 weeks of your event, so that their memories are fresh. Several on-line venues are available for surveys. Upon completion, review your evaluations or survey results and note where you could do better next year in implementing your lobby day.

Meeting Forms

Review the meeting forms and pass on any follow-up that might be needed to the appropriate person.

Wrap Up Article

Wrap up your efforts with an article in your organization newsletter or Website informing members of the results of your lobby day. The article could include the number of participants, the number of offices visited, the number of legislators that supported the issue, and the legislators your organization still needs to persuade.

Outstanding Debt

Remember to pay any outstanding debt that you might have incurred during the planning and implementation of your lobby day. Outstanding debt could be bills you incurred for catering, transportation, or sound equipment. You don't want to burn any bridges during this process.

FOLLOW UP

One of the most important aspects of a lobby day is the follow up. First, send a thank you note (via fax or email) within a week of returning home. Thank the legislator and/or staff person for their time and reiterate your support for the issue and the "ask".

Secondly, it is important to follow up a month or 6 weeks later if your legislator or their staff person did not give you a clear answer, or gave you a positive answer but then did not follow through with their commitment. Whether this is done by phone or email, or even in person at a home state site visit, the staffer and legislator will know you are serious if you follow up. Always be friendly and professional, and offer to provide additional information if it will help them to make a decision.