



*A Union of Professionals*

## Lobbying 101

# Successful Lobbying

### Planning is Half the Battle

Planning is necessary if you want to avoid wasted activity, and make your collective efforts count. It should move from the general to the specific, from the big picture to the small, from the long term to the short, from “what” to “how”. Planning entails:

- Setting a goal
- Identifying your target audience
- Devising objectives (or strategies) to achieve the goal
- Devising actions to achieve the objectives.

### Look beyond the obvious to find good objective

How do your objectives score? You need to ask for something that is real, without underestimating your goals.

Generate ideas for objectives that will lead to your goal, and then decide which to pursue.

### Meet ahead of time

One of the key factors in an effective lobbying session is to have all the members of your delegation on the same page and working together. Sitting down as a group to plan out your strategy and delegate different roles so that your team is operating cohesively will help avoid confusion during your lobbying session; and allowing each member the chance to provide input will result in a stronger message to your audience.

During your meeting you should:

- Identify your goal(s) for the lobbying session
- Assess the strengths of each participant and assign roles/topics according to those strengths
- Develop a message designed to achieve your identified goal(s)
- Assess your audience and determine a strategy for persuading them of your message
- Practice...it feels weird at first, but rehearsal works.

### Develop a message

It will be difficult to persuade your audience of anything if you spend the entire time delivering different, or (even worse) conflicting, messages. To be effective your delegation should develop one core message that covers your identified goals, utilizes your most persuasive arguments and conveys the most important information you wish your audience to hear.

When developing a message you should:

- Be concise (more than three sentences is too many)
- Be specific
- Be clear (avoid long, convoluted sentences and acronyms)

- Call for concrete outcomes (We believe ABC, and we are calling upon you to XYZ)

## Stay on topic

Employers and elected officials are busy people and if you are making tough requests that they want to avoid following through on they will often change the topic and waste time until your meeting is finished. If this happens, politely but assertively steer the conversation back on topic and stick to the plan that your delegation agreed upon. Stick to your roles and speak on the topics that your delegation assigned to each participant. Finally, record everything that is said at the meeting for later use.

## Debrief

After the lobbying session has concluded your delegation should sit down to debrief about the session. At this meeting you should assess the success of the meeting, look over your notes and determine whether there were any concrete requests that your audience agreed to that you can follow up on, and discuss areas for improvement in the future. If possible, file the notes from the session for follow up activities and use by others.

## A Few More Tips

- Lobbying is not negotiating. Union members and leaders meet with employers and bureaucrats to learn and to exchange information. The desire to “cut a deal” with a decision-maker is common, but beware. Easy wins are rarely “wins” at all!
- There is no single form of lobbying. Lobbying to get a government contract is very different from defending the interests of union members and/or specific policies for the public agencies in which they work. In the second case, public opinion is paramount and there has to be complimentary campaign efforts to win public support.
- Provide information to ‘friendly’ decision-makers on a regular basis. These people will usually embrace solid research findings that will allow them to better argue their case with their colleagues.
- Busy people don’t like to have their time wasted. You lose credibility if you ask to meet with decision-makers who have already met you without bringing new information and/or new arguments.
- Be well prepared when meeting decision-makers. You should know what this person has said about your issues. You should also know what you want from that person: an opinion, a commitment, etc.
- Do not be intimidated by the argument that “your position is interesting, but money is short.” The institution / government has access to resources; it chooses how to spend them.
- Informal clothes are fine, as long as you are neat and tidy.
- Leave behind a couple of pages (which have a much better chance of being read than a long document) on your position. Draw on pre-existing resources and research (fact sheets, etc) to support your position.



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### The Six Steps

#### 1. Establish your agenda and goals

Know what subject you are going to address. Don't overload with issues - stick to no more than two or three. Decide what you would like to get out of the visit (i.e., a commitment to vote for your issue, leadership on the issue) or you may decide the visit is simply informational.

Allow time for small talk at the outset, but not too much. Remember, it's your visit. If it is a group visit, decide who will start the discussion and put your agenda on the table.

#### 2. Listen well

Much of lobbying is listening, looking for indications of the official's views, and finding opportunities to provide good information. If you are meeting with a "silent type," draw her/him out by asking questions. If you are confronted with a "long-winded type," look for openings to bring her/him back to the point.

#### 3. Be prepared, but don't feel that you need to be an expert

Most officials are generalists, like many of us. Do your homework, but don't feel that you need to know every little detail of an issue. Provide personal experiences where appropriate. Relate the concerns of members of the community. Know when to admit "I don't know," and offer to follow up with the information. Be open to counter-arguments, but don't get stuck on them. Don't be argumentative or confrontational.

#### 4. Don't stay too long

Know in advance how much time has been allotted for the meeting. 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, even if disappointed, and say so. Leave room to continue the discussion at another time.

#### 5. Remember that you are there to build a relationship

If the elected official is good on an issue you've been involved in or has supported your position in the past, be sure to acknowledge your appreciation during the course of the visit.

If the opposite is true, think of the phrase, "No permanent friends, no permanent enemies only permanent issues." Some day, on some issue of importance to you, she may come through. In the meantime, your visit may prevent the official from being an active opponent. In other words, you may help to turn down the heat on the other side.

#### 6. Follow-up is important

Be sure to send a thank-you note after the visit. If commitments were made in the meeting, repeat your understanding of them. If staff members were present, write to them too. They can often be important allies.





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# Allies, Fence Sitters, & Opponents

Lobbying is about persuading administrators, bureaucrats, and government officials to do what you want. There are five main categories of people to think about, each requiring its own special strategy:

### Champions

All issues need a group of committed advocates for your cause. What they can do for you is make the case to their colleagues, help develop a strong “inside” strategy, and be public spokespeople. To do this, they need good information, and visible support outside the office.

### Allies

Another group of officials will be on your side but can be pushed to do more – to speak up in closed, or sometimes public meetings.

### Fence Sitters

Some officials will be uncommitted on the issues, potentially able to vote either way. These are your key targets and lobbying strategy is about putting together the right mix of “inside” persuasion and “outside” pressure to sway them your way.

### Mellow Opponents

Some officials will be clearly against you, but are not inclined to be active on the issue. With this group, what’s key is to keep them from becoming more active, lobbying them enough to give them pause but not to make them angry.

### Hard Core Opponents

Finally, there are those who are leading your opposition. What is important here is to highlight the extremes of their positions, rhetoric and alliances and to give other officials pause about joining with them. Additionally, carefully record arguments and reasoning of hard core opponents to better prepare campaign materials and media relations strategies for attack.



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### Lobby Report

Name of Decision Maker: -

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Date of the meeting:-

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Local:

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Participants:

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What were your objectives going into the meeting?

What were the main topics discussed?

Please provide your analysis of the meeting:

Did you provide the official with documents or other documents? If so, which ones?

What follow up action is required?

Was there anything that could have been done to make your meeting more productive?