

# Advocacy Tool Kit

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## What Is Legislative Advocacy?

In its simplest terms, legislative advocacy is working with individual lawmakers and lawmaking bodies to gain support for your cause or initiative, for the needs of a specific population, for an organization or group of organizations, or for specific services. Lawmakers' support can take several forms:

- ***A bill with funding attached.*** You might want to advocate with state or federal legislators to sponsor a bill which, if passed, would provide money to work on your issue or benefit your target population. Much government sponsored AIDS research has resulted from funding legislation that passed largely through the work of advocates and other activists.
- ***A bill with wording that supports a particular philosophy or helps legitimize your issues.*** Such a bill might affirm the responsibility of government to deal with a particular problem or provide a particular service. Even if there's no money attached, having that wording passed into law makes it easier to get funding later, and makes the importance of the issue clearer to the community at large.
- ***A bill with regulations that benefit your target population or advance your cause.*** A welfare reform program that includes education and training for recipients, continued medical insurance for a period after people get off welfare, and other support services is far more likely to work to the long-term advantage of recipients, for instance, than one that simply pushes people off the rolls after a certain period of time.
- ***A local ordinance that supports your cause.*** Town Councils, Board of Health, Conservation Commission, and other local bodies can make regulations that promote particular health, social or environmental agendas. For example, in the past few years, many town Boards of Health have banned smoking in restaurants in order to protect non-smoking patrons from the effects of second-hand smoke. In some instances, local housing authorities evict from public housing the families of tenants who take part in racist activity.

- **Budget Advocacy.** Federal, state and local governments approve budgets each year. Groups often advocate to put new or more money in the budget for their issues; to get proposed funding levels approved by the whole legislative body and signed into law by the executive; or to reverse proposed cuts in funding.
- **Simple political, intellectual or moral support.** This might be the support of lawmakers, like Congressman or state legislators, or it might be the support of other powerful people who don't directly make laws themselves, but are listened to by those who do. A governor of a state, or the President, for instance, can't make laws; but he can propose and veto bills, push for specific policies and set policy through the ways laws are implemented and enforced by his office.
- **Links to other contacts.** Through their own network, lawmakers and other government officials can often introduce you to other legislators or people who can be more directly helpful than they themselves can, or can call in favors to support your issue.

Actual legislative advocacy can involve anything from working personally with a legislator or aide on the wording of a bill to mobilize hundreds, or even thousands, of supporters to bombard a legislature with phone calls about an issue. It includes educating legislators, allies; and being persistent over long periods of time.

## Why Should You Engage in Legislative Activity?

Advocating for what they believe in comes naturally to many people, but there are a host of good reasons for legislative advocacy in particular.

1. Often legislative action- making something into law or appropriating public money - is the most effective way to bolster a cause or make the gains you hope for.
2. Sometimes legislative action is the only way to accomplish your goal. Appropriating public money, for instance, can only be done by legislative bodies, at least at the highest level. (Funding may come from a state or local agency, but that agency's funding come from the state, county or municipal budget. We'll discuss state budgets further later in this section.) If you want to assure public funding for something, the best way to do it is to build that funding into federal, state or local governmental budget.

3. Legislative advocacy lends focus to your issue. Advocacy, if you do it right, forces your group to define clearly what it needs, and to communicate that clearly to others. It also makes it necessary for everyone to speak with one voice, and to stick to a common purpose in order to accomplish what you set out to do.
4. Advocacy creates its own positive publicity. Speaking out on behalf of an issue, conducting various kinds of public events, and getting coverage in the media all add to public awareness and understanding of what you're advocating for.
5. Legislative advocacy often gains you powerful allies. Working with and getting to know lawmakers and familiarizing them with your concerns can make them into advocates for your cause as well, and will increase the likelihood that they'll listen to you and your constituents on other issues. Establishing personal relationships with legislators gives you credibility with other lawmakers and with the community at large.

In addition to legislators, you may find yourself in other powerful company. Depending upon your issue, you may find yourself thrown in with business and corporate leaders, officials of national organizations, celebrities and others who can be important allies.

## When Should You Engage in Legislative Advocacy?

Real estate agents often say that the three most important factors in selling a house are location, location and location. By the same token, the three most important factors in conducting effective legislative advocacy are often timing, timing and timing. Legislative memories can be short, and today's all-important issue can be tomorrow's item of no concern. While good advocates keep at it all the time, deciding when to do a real push can be crucial to success. Times when advocacy efforts are particularly important include:

- ***When the lawmakers are about to take up something crucial to your issue.*** If someone has filed, or is about to file a bill that's particularly favorable or unfavorable to your cause or your target population, or if someone is proposing funding increases or cuts that will affect you, it's definitely time for action.

- ***Just before and during budget time.*** If you have funding concerns, the time to make them known is when legislators are actually working on the budget for the next fiscal year. At the same time, if they're thinking of making cuts in your area, you want your voice to be heard while they're deliberating.
- ***When your issue or target population is drawing attention.*** The adage, "Strike while the iron is hot" applies here. If a book about your issue has just been published and is being widely read and quoted, it's a perfect time to add the voice of your advocacy group- as an "expert" to the discussion. If there's suddenly an epidemic of what ought to be a controlled disease, it's a perfect opportunity to advocate for funding for vaccinating all children, or a particular group of children. If there's a debate about welfare, advocates need to make sure that the voices of welfare recipients are heard, and that legislators think about the real effects of suggested policies.
- ***When a vote is likely to be very close.*** In that case, you may have to pull out all the stops in order to try to influence the votes of a few key lawmakers.
- ***When a bill or budget - or the veto of a bill or budget - that hurts your cause has just been passed or signed, but can still be changed by an amendment, a veto or an override.*** Now, when you have to act quickly and decisively, is the time when careful organizing can really pay off. If your group can produce a flood of phone calls and visits to legislators, all with the same message, you're more likely to accomplish your goal.
- ***When it's important to make legislators aware that your issue exists.*** Many areas that are now regularly discussed and funded by legislative bodies - environmental preservation, adult literacy education, services for the homeless - were unmentioned and, often, unheard of, until concerted efforts by advocates brought them to lawmakers' attention.

## How to Advocate

*"I believe the function of changing policy is to make the unknown, known - as I like to believe policymakers are not inherently insensitive; they just fall prey to all the myths and fears that society has toward people with disabilities.:"*

### KNOW THE PROCESS

For the professional lobbyist, knowing the process means knowing a myriad of formal rules and procedures of the Legislature. If you are not a professional lobbyist, you must have a familiarity with the rules and procedures, or know where to find them if you are not familiar with them.

- **UNDERSTANDING THE RULES.** Part of knowing the process involves having an understanding of the rules. Rules are the methods of procedure adopted by each of the bodies. Rules tell you how things are done. When understanding rules, you will function with more confidence and will work comfortably in a milieu of “bills, amendments to bills, committees, floor action, vetoes, and much more. In addition, you will have developed a vocabulary that allows you to communicate meaningfully in this milieu.
  
- **KNOW THE NETWORK.** Become familiar with the roles and responsibilities of legislative leaders; information about and interests of legislators generally; the responsibilities of key staff; and the function, availability or location of the following: the Governor and other Constitutional officers, key state agencies and their heads, the research library and information offices, Capitol tours, parking spots, restaurants and social gathering spots of legislators and other movers and shakers.
  
- **BE POLITE** in all your dealings with legislators and staff. It is easy to drift over the boundary when you feel strongly about an issue. Don’t be too aggressive, too forward, too pushy. **REMEMBER:** Doors can be closed to you just as easily as they can be opened. Just as there are certain traits that you must have to lobby successfully, there are also behaviors that will not serve you well. Among these are the following:
  - **Threatening a Legislator.** Threats are rare, but they do occur. Usually the threat is “I’ll get you in the next election.” Anyone who makes such a threat will lose that legislator’s support. News of a threat will spread quickly along the legislative grapevine and more credibility will be lost. No one needs that.
  
  - **Exhibiting Inappropriate Behavior.** Sexist or racist remarks are too offensive to need further comment here. However, there is more subtle

type of inappropriate behavior. To put it bluntly, there are times when you simply are not wanted. Face it. A legislator may be talking or meeting with another legislator or with his/her staff and you have a compelling urge to join them and share your: critically important” information or insights. Don’t. Don’t barge in or interrupt. Know your boundaries.

- ***Making Disparaging Remarks About Legislator Who Oppose Your Position.*** It is often stated but bears repeating: Today’s opponent may be next week’s supporter. You need them more than they need you. This also bears repeating: One of the silliest things you can do is burn bridges.
- ***Coming In With Last Minute Requests.*** Legislators realize there are times when these requests cannot be avoided. An amendment to a bill may or may not be ready or a fiscal note may be incomplete. However, if you choose, for whatever reason, to do little or nothing throughout the legislative session, legislators will be very irritated with last minute I-gotta-have-your-help requests. A better way to ensure your bill progresses through the legislative process is to be involved and prepared throughout the session, not just in the closing days.

## MEETING WITH LEGISLATORS

*“You think you’re lost?” The story goes - some new legislators have shown up at the St. Paul Cathedral rather than at the Capitol when it was time to take office. The two builds do have some things in common:*

- 1) They’re both tall; and*
- 2) Prayer is often needed in both!*

A personal visit is the most effective means of communicating with a legislator. It provides you with the opportunity to “read” his/her reaction to your request for support, and for you to be able to respond immediately - something that cannot be

accomplished as well by letter, telephone call, or another means. The personal visit also provides both of you with the opportunity to get acquainted, an experience that may prove helpful in the future contacts as well.

You definitely should make an appointment in advanced. Legislative staff may ask how long you think you will need to discuss your issue. In that case, request half an hour. During the hectic, closing days of a session, request 15 minutes. **REMEMBER:** You are competing with many others for a legislator's time. Be considerate. In some cases, a legislative staff will tell you how much time you may have. Always take what you can get.

Attempt to make your visit timely. Visits prior to a vote by the committee in which your bill will be heard are particularly effective. Visits prior to a vote by either the full Senate or House are also helpful.

If you just drop in at a legislator's office, you could be disappointed. He or she may be occupied with one of numerous legislative activities that need attention throughout the day, including meetings with people who had previously scheduled appointments. Even if there is a possibility of arranging a brief visit, you usually will have to wait. Furthermore, staff is generally not thrilled with drop-ins because they raise havoc with the daily schedule. **REMEMBER:** Constituents are an exception and generally can be worked in somehow.

**INTRODUCE YOURSELF.** Give your name, address and the organization you represent or with which you are affiliated, if that be the case. Do not overdo your comments about the worthiness (or the clout) of your organization. That is not why you are there.

**REMAIN FOCUSED.** Although you probably gave a reason for your visit with him/her when you scheduled your appointment, briefly reiterate. If you are visiting on a particular bill, have an extra copy to share. This saves time. Apprise your legislator of the status of the bill and include any significant committee action that has taken place.

**EXPLAIN WHY YOU SUPPORT THE BILL.** You may use either objective information or data or anecdotal information - or both. Convey this in a way that shows you are knowledgeable and committed.

If you are visiting with another person(s), make sure your time is well spent by not repeating yourself. Decide in advance of the visit who will say what. It is particularly helpful if you can relate personal experiences based on provision in the bill and what the bill will accomplish.

**ALLOW TIME FOR QUESTIONS** and be prepared to respond to these. Never bluff. If you do not know the answer, say so. Follow up with the answer at a later time.

**NOTE:** In the course of any day, legislators are confronted with numerous issues, often times emotional ones. Therefore, be patient if a legislator interjects his/her feelings or opinions on an issue (unrelated to yours. You may have to shorten your comments) or even schedule another appointment); however, there are times such as this when being a good listener is the role in which you are cast. Accept it.

**ASK THE LEGISLATOR WHETHER OR NOT HE/SHE WILL SUPPORT THE BILL.** Although you may be hesitant to do this, you need to do so to determine the extent of support the bill has. Tell supporters how much you appreciate their stand. Opponents need to know that, although you disagree with them, you respect their stand - and even understand their wish or need to oppose your position, in some cases. For those who won't give their position, ask whether you can provide additional information to help them make a decision. Whatever you do, do not burn bridges. Today's supporter may be next week's opponent, and vice versa.

**CONCLUDE AND EXTEND YOUR APPRECIATION** for the opportunity to visit, no matter what the outcome of the visit. Never leave on unfriendly terms.

**WRITE A FOLLOW UP THANK YOU LETTER.** Include any responses questions that were asked during the visit and for which you did not have an answer at the time.

## LETTERS TO LEGISLATORS

*And you thought you didn't count! A staffer, noting how sensitive legislators are to contacts from constituents, stated that she often tells the legislator that "a letter flooded in."*

Letter writing is probably the most the widely used means of communicating with legislators, and they do pay attention to their mail. Legislators readily acknowledge

that a good letter - particularly from a constituent - can make an impact. That is why it is so important that your letter is powerful.

**The following guidelines will help ensure that your letter will have maximum impact:**

- The letter should be brief, preferable one or two pages (at the very most). Unfortunately, some people who feel strongly about an issue may have an irresistible urge to tell “the whole story” and believe a legislator must have all the details. Usually that translates into a long letter. Resist the urge. Keep it short.
- A form letter, preprinted card, or other superficial means of communication has little effect. If it’s from a constituent, it may have some impact; others should forget it altogether.
- If you are writing about a specific bill, include the bill number and a brief statement on the subject matter at the beginning of the letter. Because thousands of bills are introduced each session, it is impossible for individual legislators to track all of them.
- Discuss only bill issues in your letter. This makes it far easier for legislators or staff to track. If you wish to comment on several issues, write separate letters.
- Your letter should be neat and your tone sincere and polite. Guard against being whiny or maudlin; do not threaten or belittle.

*“Have your facts straight. Once I agreed to another bill and I was told there was no opposition in my community. It was a local bill. Now, after its law, opposition is surfacing and I’m getting blamed.”*

## Your letter will have maximum impact if it contains the following components:

- A brief statement (ten words or less) on the subject; bill number if writing on a specific bill.
- An introduction of yourself which tells why you are interested on or concerned about an issue or bill.
- A personal anecdote about how the bill will affect you, your family, your community, your business, your job, your school, etc.
- Some facts, including supporting information and data to support your position.
- An invitation to contact you to discuss the bill, if desired.
- A request for a reply if you need one.
- A statement of appreciation for consideration of your position.

In addition to letters showing support (or opposition), legislators receive letters requesting assistance to resolve issues with bureaucracy. These requests usually are from constituents. In these letters, a legislator is called upon to be an advocate or ombudsman. This role has expanded in recent years, and significant support staff exists solely to respond to these requests. If a legislator is able to intervene successfully, the constituent is pleased. This is always important to any elected official. EXAMPLE:

Dear Representative Smith:

The aging network has advocated for approval of the Senate version of the Blue Cross Blue Shield bills. We feel that your version best represented the interests of the State's senior population.

We are grateful for your vote supporting the Senate version of the BCBS bills. Your vote clearly indicates your understanding of our concerns and the needs of senior citizens, not only of Lapeer County, but Genesee and Shiawassee Counties, as well.

Thank you for your support and dedication to the senior citizens of our community.

Sincerely,

John Doe, Chairman  
Board of Directors  
Valley Area Agency on Aging

## TELEPHONE CALLS TO THE LEGISLATORS

### *Will they answer the ring? Or will the machine?*

Telephone calls can be an effective means of communicating with legislators if the calls

(1) convey a meaningful message with helpful information, and (2) are made in a timely manner.

Calls from constituents are the most effective; “telephone blitzes” are the least effective. Other calls are somewhere in between.

It is important to remember that, during the legislative session, legislators usually are attending committee meetings, conducting other legislative business such as meeting with staff, drafting legislation, or participating in formal legislative work in the Senate or House chambers. Therefore, it is likely that a legislator will not be able to take your call. If that is the case, do not hesitate to leave your message with a legislative assistant or other staff. Trust the staff to get your message to the legislator.

If you request a return call, you can usually be assured of getting one if you are a constituent. Others *may* get a return call. Remember that there simply are not enough hours in the day for legislators to return all calls, particularly if there is an organized blitz underway. Fortunately, most people are comfortable leaving their message with staff.

It is important to make your phone call brief and come quickly to the point. Always be polite.

### **In conveying your message, do the following:**

- Identify yourself with your name and your city or town of residents.
- If your call is regarding a specific bill, give the bill number and subject matter.

- State your support (or opposition) to the bill and a brief reason for your position.
- Request the legislator's support (or opposition) to the bill.
- Indicate your availability to discuss the issue further, if desired.
- Leave your telephone number.
- Express thanks.

Your call will have the most impact when received within a week of the bill's begin hearing in committee. If the legislator serves on the committee hearing for the bill, that is a bonus. Another appropriate time, but usually not nearly as effective, is shortly before the bill is heard by the entire legislative body.

Legislators also receive many calls from people requesting assistance for a problem with the bureaucracy. These calls are handled in the same manner in which letters requesting assistance are handled.

Finally, there is the call that may or may not have impact - it all depends. This is the call that is part of a blitz. Usually these calls are part of an organized effort to simply overwhelm a legislator's office. The calls do not provide much in the way of helpful information. Be careful with blitz calls. They tend to irritate legislators and staff because they take up valuable time that most believe could be put to better use.

In spite of their dubious value, blitz calls are not totally ignored. However, you can count on one thing; a blitz is seldom, if ever, the main reason for the passage or defeat of a bill.

## DO'S AND DON'TS OF ADVOCACY

### TIPS FOR ADVOCATES ON MEETING WITH ELECTED OFFICIALS

#### DO

- Be a good listener and hear out what the official has to say.
- Be concise and clear about your interest.
- Offer to serve as a resource.
- Respect the right if the official to disagree with you and vote against your issue but try to establish a common interest.
- Provide written materials - one page handouts are effective.
- Follow up on any commitments made.
- Thank the official for his/her time and interest in your issue.

## **DON'T**

- Go over the allotted time unless it's obvious the official wants to spend more time with you.
- Criticize people on a personal level - talk about the issue.
- Ask for more than one meeting with the same official on the same issue unless you have something different to say.
- Tell the official what he/she "should" do. Put your message in the form of a request and explain how his/her action will affect constituents.
- Burn your bridges. Show anger or resentment toward officials who vote or act against you. You may need their support on another issue! Say "maybe you can help me next time" and make sure the next time happens!

## **TIPS FOR ADVOCATES ON MAKING PHONE CALLS**

**IDENTIFY YOURSELF** - Give your name and city and explain that you are a constituent with a concern.

**BE FLEXIBLE** - Ask to speak to the elected official directly, but if that isn't possible, speak to his/her aide. Aides do a lot of research for legislators and often recommend what they should do.

**IDENTIFY THE ISSUE** - Have notes handy with the specific bill number or title and any statistics you want to convey. State your position clearly and directly.

**BE POLITE BUT FIRM** - Do not threaten with the power of your vote. If the elected official disagrees with you, don't hesitate to politely push back.

**ASK FOR INFORMATION** - Elected officials have lots of valuable information that they are more than willing to share. Ask when action is expected on your issue. Ask about the opposition and what impact they are having.

**ASK FRIENDS TO MAKE PHONE CALLS** - One call is powerful and five is even more so.

**REMEMBER - ON ANY ONE ISSUE, EVEN A FEW PHONE CALLS CAN HAVE AN IMPACT.**

## **TIPS FOR ADVOCATES ON WRITING LETTERS**

**BE BRIEF** - Boil your message down to one page or less and attach any detailed information, charts, etc. on separate sheets.

**BE DIRECT** - Tell the elected official what action you want him/her to take, such as introduce legislation, cosponsor a bill, vote for (or against) a bill in committee, or on the floor. Ask him/her to respond to your letter. Be sure to include your address and phone number.

**BE CIVIL** - Don't threaten, insult, wisecrack or name call.

**DON'T OVER DO IT** - Don't write too often. Make your letters timely so your legislator can take positive action to help.

**PERSONALIZE** - Use your own words. You don't need to type the letter - handwritten letters are very effective if you have legible handwriting. Avoid form letters and postcards.

**FOCUS ON THE ISSUE** - The more facts you know, the better. Refer to legislation by title or number. Cite experts to back up your arguments.

**COMPLIMENT** - Elected officials are human and like to be recognized and thanked for their work. Always write a thank you note if the elected official does what you ask.

**REMEMBER - ON ANY ONE ISSUE< EVEN A FEW LETTERS CAN HAVE AN IMPACT> EVEN ONE LETTER< WITH A CLEAR-CUT ARGUMENT CAN BE A DECISIVE FACTOR!**

## TECHNICAL ASSISTANCE

### CONGRESS

1. Congressional Guide <http://capwiz/nyt/home>  
Complete contact and committee information for all members of congress
2. Congressional Staff Directory  
<http://www.congress.org/congressorg/directory/congdir.tt>
3. Voting Records for Congress <http://www.vote-smart.org>

### STATE

1. Government Directory <http://www.michigan.gov>

**2. Legislator**

<http://www.legislature.mi.gov>

Bills, House & Senate Membership

**3. Gongwer News Service**

<http://www.gongwer.com>

Update on bills and legislative news

