

THE BUILDING BLOCKS OF ADVOCACY

NACCTFO - FEBRUARY 25, 2017

AGENDA FOR TODAY'S SESSION

1	Advocacy	60 min
	<ul style="list-style-type: none">• General• Local• State• Federal	
2	Chamber of Commerce Reception Exercise	30 min
3	Community Relations	10 min
4	Media and Social Strategies	20 min
5	Takeaway: Advocacy Plan	15 min
6	Q&A	15 min

FIRST THINGS FIRST

- Cafeteria Style: Take Some, Leave Some
- Acknowledge that this is a process
- Make sure your advocacy activities comply with your own state laws

ADVOCACY IS VITAL

- Think less about “lobbying” and more about “advocacy”
- Effective lobbying is built on effective non-lobbying activities
- Not being an advocate is NOT AN OPTION (*i.e.*, do not allow yourself to be invisible)

SO, WHAT IS ADVOCACY?

- Advocacy = Building Relationships
- Advocacy = Being an Educator/Issue Expert
- Advocacy = Becoming a Trusted Resource

ADVOCACY: BUILDING RELATIONSHIPS

- Choose priorities for where and with whom you spend your time; however, always be open to expanding your network. In the political and governmental world, positions change all the time
- LISTEN and learn what matters to them (e.g., take notes and an inventory of issues)
- Think of this as a long-term process, with multiple meetings and touch-points
- KNOW AND RESPECT STAFF. Proactively exchange contact information and promote teamwork and open communication.
- Don't wait until you have a problem to reach out. Get in early, long before you have a problem or an "ask"

ADVOCACY: BEING AN EDUCATOR/EXPERT

- The work that you do matters, and it's your job to help people understand what you do and why it's important
- Legislators have very little time to master specific policy areas (this is where you play a special role)
- Generally, legislators rely heavily on veteran staff members and/or issue experts for history and context on issues (make yourself available as an educator)
- TIP: Your issues can be complex- have an elevator speech that describes what you do succinctly and effectively

ADVOCACY: BECOMING A TRUSTED RESOURCE

- When a local government or fiscal issue arises, you want to be the first person your elected officials call
- Generally, legislators cannot know everything about every issue (your task is to become the person he/she trusts on local government issues, so they turn to you for advice)

INFORMAL/INFORMATIONAL MEETINGS

- Face time matters
- Start this process early
- Be cognizant of the timing of requests- know the legislative / commission / council cycles
- Schedule in advance and confirm your meetings
- Avoid heavy/excess materials
- Meetings are great, but events or tours at your facilities are even better
- Use an elevator speech and talk about some of the responsibilities of your office
- Offer yourself as a resource
- If you have policy ideas or suggestions for change, let them know that you'll follow up with a more formal meeting
- If they ask questions, ALWAYS FOLLOW UP
- Gather contact information for them AND their staff, ask how they prefer to be contacted
- NICE TOUCH: Send a letter/email of thanks

FORMAL MEETINGS/COMMITTEES

- This is the time for more data and details- game on!
- You may only have 10 or 15 minutes of their time in a meeting, be concise and be flexible, also be prepared to talk to staff
- Ask staff for questions in advance to prepare
- If you are testifying- practice!
- It's ok to say you don't know and will get back to someone- but make sure that you do it promptly and provide status
- Bring a back-up person to take notes, provide data and related support
- Ask how many copies of materials you should bring for the meeting/ committee members and audience
- If you have a lobbyist or other advocacy group, coordinate with them
- Follow up with a letter/email with a recap, open items and next steps

ADDRESSING LEGISLATION/POLICY OPTIONS

Be prepared and knowledgeable :

- Know the bill/resolution number and sponsor
- Know the FACTS of the bill/resolution
- Why it's important to your county- what is the impact?
- Pros and cons
- Know the opposition argument and respond to it
- Offer suggestions for amendments (if you have them)
- Offer to be a resource

ADDRESSING URGENT MATTERS

- Ideally, you can call your legislator and have a brief conversation about the matter
- If this isn't the case, consider the following:
 - Start by finding your commonality
 - If you support- thank them and ask how you can help
 - If you oppose- share how your commonality will suffer
 - Share your expertise and offer to be a resource
- If a face-to-face discussion is not possible and you only have time for a call, make sure you leave your position in your message
- If you have a lobbyist or advocacy association, make sure they know your stance and any facts/data/reasoning so that they can spread the message to their networks

THINK LIKE A LEGISLATOR

- Consider:
 - What do they want?
 - Who can give it to them?
 - What do they need to hear?
 - Who do they need to hear it from?
- Can you deliver the message on your own or should you bring in reinforcements or a surrogate? Additional support is never a “weakness”
- What is the opposition argument? Know it so that you can counter it with your own facts/data/reasoning

CONFLICTS HAPPEN

- Conflicts happen and sometimes personalities don't mesh
- Be respectful
- Try to bridge the gap
- Stick to the issue- don't make it personal
- Find a workaround strategy
- If all else fails- find a surrogate to send your message

LOCAL ADVOCACY

- Attend county and municipal meetings regularly, not just when you are addressing the body or need something
- Attend community group and organization functions regularly
- Invite local electeds to your events/trainings
- Who are your priority people to connect with? When? Why?
- Use your memberships and other local resources
- Create useful tools and handouts
- Create a list of and a schedule for local meetings to attend

STATE ADVOCACY

- Meet with your state legislators on a regular basis- both in district and in their office
- Does your county have a regular legislative check-in meeting or event on the calendar?
- Who are your priority people to connect with? When? Why?
- How do you stay abreast of issues?
- Do you know how to access state policy information online?
- Use your memberships and other resources
- Create useful tools and handouts

FEDERAL ADVOCACY

- Who are your priority people to connect with? When? Why?
- Do you have regularly scheduled meetings or events where you will see your congressional members?
- How do you stay abreast of issues?
- Do you know how to access federal policy information online?
- Use your memberships and other resources
- Create useful tools and handouts

FOLLOW THE GOLDEN RULE

- Legislators are people. Most are good people who want to do good things. Understand that they probably don't know as much as you do about your issues and help them by being an educator
- Bridge the gap- I work for you and OUR community by doing X...
- Treat them (and their staff) as you would like to be treated

CHAMBER OF COMMERCE RECEPTION EXERCISE

- 1 Think about and write out an elevator speech. 2 or 3 sentences about what you do that makes sense to a 4th grader and makes you sound like you have super powers. 10 minutes
- 2 Role play a brief meeting with a legislator with a partner. Here's the setting: You are attending a chamber of commerce event and you see your state senator. She does not have a local government background and you only met her briefly during her campaign. Introduce yourself, use your elevator speech and have a 3-minute conversation. Then switch roles. 10 minutes
- 3 What went well and what went poorly? What are your takeaways? 10 minutes

COMMUNITY RELATIONS

- It is important for you to have a community relations agenda- which 3 issues can you incorporate into this agenda? What is your message to the community? (Examples: financial literacy, housing, utilizing the services of your office)
- Choose community groups to connect with on a regular basis- governmental, public and private (Examples: Realtors Associations, banks and credit unions, community groups, United Way or housing specialists)
- Attend events- get more bang for your buck: use social media and invite other elected officials

SOCIAL PRESENCE & NEW MEDIA STRATEGIES

- Like it or hate it, social media is now an important communication tool
- Separate your personal and professional pages
- Separate your overtly political and public agendas- be mindful of public resources
- Understand any laws and policies that define your social media use as a public official
- Create your own policies, if necessary, for you and your staff

SOCIAL MEDIA

- Social media as a customer relations tool:
 - Share important information, deadlines, and updates
 - Publicize meetings and public hearings
 - Share tips and news
- Social media as an advocacy tool:
 - Show your elected officials a little social love
 - Share and tag photos of community relations events
 - Share stories of the policy initiatives of your office

RESOURCES

- Resources on the legal nuances of government officials, public agencies, and agency staff utilizing social media:
 - Social Media & Governments- Legal & Ethical Issues By Julie Tappendorf (posted on IN.gov)
 - California's Institute for Local Government- Social Media and Public Agencies: Legal Issues (www.ca-ilg.org/socialmedialegalissues)
 - NCSL's database of policies related to legislative use of social media (posted on ncsl.org)

BRINGING IT ALL TOGETHER: CREATE YOUR ADVOCACY PLAN

- 1 Use your worksheet to begin your advocacy plan. It should include elected, community relations, and new media components. Who do you need to meet with or work with to make this happen?
- 2 Share your strategies/plans with the group

THANK YOU!

Let's connect!

Dana Gill

External Engagement Consultant

integratedengagement@gmail.com

Tel: 313.269.1467