

NEW TO LOBBYING?

You have a voice - it's time to use it. Lobbying is a key way nonprofits can advance their mission, amplify the voices of their supporters, educate policymakers, and protect their values.

This toolkit will guide you through the best practices for lobbying as a nonprofit.

PREPARING TO LOBBY

Advance preparation is a key factor in shaping a successful lobby visit. The following do's and don'ts will help you prepare for a productive meeting with a legislator or their staff.

DO

Establish Relationships. When a new legislator is elected, reach out to them so you can educate them on your issues and concerns. If you are a service provider, invite the legislator to tour your program and provide a packet of information on the services you provide, the people you serve and the importance of your services to your clients and the community.

Do Your Research. Before your lobby meeting, get to know the legislator's record on your issue. Check their voting record and public statements. Take note of areas where you agree and disagree and which of your issues the legislator has worked on or supported in the past. If you are lobbying on legislation that has been voted on in previous legislative sessions, know how that legislator voted.

Prepare Materials. You should have a packet of information to give to the legislator—preferably have a few packets so you can provide them to the legislator and any staff that attend. In this packet, include information about your organization, your business card and contact information, and supporting information to back up your assertions or to dispute opponents' claims. Make sure you provide information on how this issue affects the legislator's district or the state—if possible, let them know how many people will be affected, how they'll be impacted, and how much it will cost taxpayers. If you are lobbying on a specific piece of legislation, have a bill memo that outlines your support or opposition to the bill.

DON'T

Ignore the Opposition. Assume that the legislator is open to changing his or her opinion until and unless you know otherwise. Even if a legislator is opposed to some of your agenda, you may find you have some areas of common agreement.

Limit Your Lobbying to Your Elected Representative. Organizations should develop relationships with more legislators than just those who represent the district in which their nonprofit is located. You should also lobby and develop relationships with representatives who sit on committees that consider bills in your issue area. For example, if your organization provides health services, it's a good idea to have relationships with representatives on the health committee, as well as any committees that address insurance laws and health care financing. If your organization is lobbying in support or opposition of a bill that will be voted on by the entire legislature, you may consider leaving memos of support or opposition with all representatives.

Forget to Make an Appointment. This is especially critical if you want to meet on a day the legislature is in session; it's a popular time to meet with your legislator. Sometimes it's easier to schedule an appointment at the legislator's district office.

LOBBYING TIPS

Most lobbying meetings are short — perhaps only 15 minutes or less. Be prepared to get the most out of your meeting.

DO

Expect Unpredictability. If you are lobbying on a day the legislature is in session, don't be surprised if a legislator's schedule changes. Legislative meetings are often called on little notice, and legislative sessions can run over. Remember to be flexible and not get flustered or angry if plans need to be changed. Legislators often hold impromptu meetings with constituents and lobbyists in between votes or meetings. Offer to meet the legislator or staff member at a different time or place if an important meeting gets changed.

Have a Plan for the Meeting. You should have a lobbying plan before you meet with a legislator or their staff. If you are lobbying with a group of people, have a group leader who will lead the meeting. Decide in advance who will speak on which topics. During the meeting, introduce everyone, and let the legislator know where you are from, especially if you bring constituents to the meeting. Having a constituent speak to how an issue affected them can be very powerful. Don't allow yourself to be diverted from the purpose of the meeting.

Listen. At a lobby visit you are there to get an answer to your ask, and to learn about the legislator's thoughts about your bill or issue. Don't do all the talking, and listen to what the legislator has to say. You can often learn valuable information about the status of a bill. Even when you don't see eye-to-eye, don't argue; you want to preserve your relationship for future visits.

Have the Solution. Is the purpose of your meeting to make the legislator aware of a problem? If yes, your position will be significantly stronger if you also can propose a solution. You could draft amendments to a law or proposed legislation, or draft a new law or a resolution that the legislator could consider introducing.

DON'T

Forget your "Ask." Every lobby meeting should have an ask. Do you want the legislator to support a bill? If yes, ask for their support. You can also ask a legislator to sponsor or co-sponsor a piece of legislation, to talk to his or her colleagues about supporting the bill, or for help in getting it on a committee or floor agenda. Even if your bill is not supported by the legislator, you can ask that they allow it to go through a committee, or have it brought to the floor for a vote, depending on their role in the legislature.

Overlook the Importance of Staff. Legislative staff act as the eyes and ears for the legislator. Do not be insulted if you meet with staff; in fact, it's just as important to develop a relationship with staff as with the legislator. Staff will often have more expertise in an issue area than the legislator, especially when legislators are term-limited and only work on an issue temporarily. If you meet with staff, ask them where the legislator stands on the issue and what concerns the legislator may have on it.

Make Up Answers. No one knows everything. If the legislator asks a question you cannot answer, say you will follow up with the information, or offer to connect the legislator with an expert who can answer their question. Either offer leaves a great opening for a follow-up visit.

Forget the Snacks. Self-preservation is important. Lobbying often involves a lot of walking and/or waiting. Make sure you are prepared. Most lobbyists find it helpful to carry a big bag with snacks, water, phone charger, a sweater or wrap and a pair of shoes that are good for walking and climbing stairs.

POST-LOBBYING TIPS

DO

Follow the Rules. Know the lobbying rules in your state. Every state has some form of lobbying disclosure and registration requirements. Make sure you register and report your lobbying activities if you meet the threshold that triggers these requirements.

DON'T

Forget to Thank or Condemn Legislators. Whether acknowledging key actions or inactions, communicating your position will ensure your supporters and the public are aware of their elected officials' actions. When thanking or condemning legislators, an organization can encourage its supporters to thank the legislators who voted in line with the organization's advocacy agenda, and to criticize those who did not. Many organizations will use their social media platforms for this accountability advocacy.

Visit the Bolder Advocacy website at bolderadvocacy.org to find more resources, and reach out to our team of advocacy coaches with any questions.

YOUR FINAL DO