

2016

Lobbying Tips and Steps

Lobbying Steps and Tips for Union Activists

What is Lobbying?

Lobbying is one tactic to achieve a campaign goal.

Lobbying can take many forms, including phone calls, letter writing, petitions, attending important meetings or events and speaking up.

Lobbying is not about confrontation.

Elected representatives are people just like us.

This Guide outlines how to carry out an in-person, face to face lobby.

Why lobby?

Lobbying is one way we can influence politicians. They are the people who make policy and program decisions, decide what gets funded and what doesn't. They also can influence other politicians.

Lobbying is a way to:

- Make our views known to politicians;
- Demonstrate support for progressive positions or ideas;
- Find and build on common ground with elected officials;
- Provide information and educate politicians on issues that are important to our members;
- Make sure that politicians are living up to their election promises.

Being lobbied is part of a politician's job. Corporate lobbyists representing private sector interests are busy lobbying to profit from privatization, deregulation and to destroy labour rights.

We can't let them be the only voices politicians hear from.

When we lobby it helps politicians learn more about the issues and impact their decisions have.

Why should we lobby?

We don't need to be an expert on the issues to lobby a politician.

For a number of reasons, workers who deliver public services have an important perspective on decisions that affect our work and our communities.

First, politicians are our representatives. They are accountable to us! We are residents, service users, taxpayers and caregivers ourselves.

We are "constituents". Their job is to represent our interests.

Second, politicians are our bosses. By lobbying we can help make our work and the services we deliver more fair and effective. We know what is needed on the front line.

Lobbying can strengthen our position in bargaining by helping to direct resources where they are needed. Lobbying can also help keep work in the bargaining unit. We can educate representatives about the dangers of privatization and contracting out.

Lobbying can help protect good jobs and promote effective programs and strong communities.

When do we lobby?

It is always a good idea to build relationships with politicians whose decisions affect our work.

Sometimes we lobby around a single issue at a point in time when it matters; as part of a proactive campaign, or in response to a proposed policy or service cut.

Lobbying can also be an ongoing activity that a local undertakes, or as a way to support bargaining.

Do I need to be an expert? NO! Just be prepared.

How do we lobby?

There are three main stages to any lobby:

- I. Before the meeting
- II. During the meeting
- III. After the meeting

Anyone can do it!

Part I. Before the meeting: Things to know and do

Understand why you are lobbying: what do we hope to achieve?

Identify who you would like to meet with.

- There are good reasons to lobby politicians who share your views, who oppose them and who are somewhere in between. Be strategic:
- We lobby those who are likely to support us to remind them to do it and to offer assistance.
- We lobby those who *might* support us to encourage them and provide information to help them in their decision.
- And we lobby those who are not likely to support us to encourage them to reconsider, by sharing evidence that supports our position, and by reminding them that their constituents are watching how they vote.

Build a lobby team.

- Do not lobby alone. This creates safety and an even playing field. Politicians normally include their staff.
- Ensure that you have a balance of experience. Include service users.
- Is there an important point of view missing?
- Keep the numbers reasonable. If you are more than four people, notify the politician's office and ask if it is okay to bring a large delegation.

Set up a meeting.

- Schedule the meeting by calling the representative's office.
- Think of this as the first part of your lobby. Build a good relationship with staff.
- Let them know briefly who you are and what you would like to discuss.
- Let a communications rep or staff rep know what you are planning. They might be able to provide information and support.

Prepare what to say.

- Spend some time reflecting together on why you and your team care about the issue.
- Choose an experience you can share that will shed light on the issue. Discuss these in your team and decide which to share during your lobby meeting.
- Use CUPE materials to help with your messaging. Work with staff.
- Speak to friendly politicians or others who can help you understand the position of the representative.
- Speak to the concerns and arguments of those who disagree with you.
- Get a good handle on who each of YOU represent. Be able to describe your local/sector and the work your members do in the community.
- CUPE is the largest union in Canada. That is a powerful constituency.
- What constituency does the politician represent? How does that relate to you?
- Politicians are just people with a job. Try not to be intimidated.
- Remember that sharing personal experience as workers or residents is the best way to make a lasting impression.

Checklist for what you will cover:

- ✓ Who you are and what you do
- ✓ The topic you want to discuss (why you are there)
- ✓ What you know (info you have for them)
- ✓ Why you care (Examples, personal stories)
- ✓ Why they might/should care/ how it relates to their work
- ✓ The ASK:
 - What you want them to do
 - Questions you have for them
- ✓ Invite them to any public events you might be having
- ✓ Offer to be a resource

Make a plan.

- Prepare your key points and questions (see textbox: "Checklist for what you will cover")
- Who will do and say what, and in what order?
- Make sure everyone on your team has a chance to speak if they wish to.
- Make sure one person takes notes.
- Select some brief materials that outline the main issues to leave with the politician.
- Who will present the material you have brought to leave behind?

Part II. During the Meeting

Take the lead. You asked for this meeting.

- Do not read from your notes. Review them in advance and use them as a guide.
- Use the time well. Be brief, stick to the key points you have prepared, unless you are answering a question. Try not to let them take you off course.
- It's okay to say "I don't know" you don't need to be an expert. "I would be happy to find out and get back to you," is a perfectly respectable response.
- Provide brief materials to leave for them.
- Review your key messages and any follow up that was promised by you or the person you are lobbying.

Keep your tone cool.

- Be honest. Be respectful.
- Speak slowly.
- Pause after you have made your pitch to allow for the representative to share their thoughts and views.
- Keep relations positive. This can help you in the future.
- It's okay to ask questions and respectfully disagree.

If they say they are on your side, ask if this is something they can support publicly.

If the person doesn't show up....

Don't fret! Meeting with staff can be very valuable.

They will brief the politician, and may even know more about an issue than the person you are trying to meet.

Your relationship can help you with future lobbying.

Part III. After the Meeting

Debrief as a team

- Plan where and when you will do this.
- Discuss:
 - What worked well?
 - What did you learn?
 - Is there follow up required? Another lobby meeting?
 - Who will do what?

Follow up on anything that came up during the lobby meeting

- Send an email thanking the politician for their time. Remind them what the meeting was about.
- Summarize any agreements or next steps that were identified.
- Provide any additional information you might have promised.
- If they had questions that you were unable to answer, contact someone who can help get the information and then pass it on to the representative or their staff.
- Report good news to your members in your communications and on social media.
- Don't badmouth the politicians that you met with.

Create a lobby report to share with your members and with CUPE.

Include the following information:

- Names of those who participated in the lobby.
- Names of elected representative and staff you met with.
- The topic and what you hoped to achieve.
- The main questions you asked.
- What you learned.
- Any commitments made by the politician.
- Anything said that surprised you.
- What follow up is needed.
- What worked well.
- Your next steps.

Celebrate! You are exercising your democratic rights and helping build a better world.

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