



Great Public Schools for Every Student



Lobbying 101

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Lobbying 101

Lobbying is an organized effort to attempt to influence a decision.

Lobbying skills can be used at a variety of levels of government, depending on the needs of your local association. You may be lobbying superintendents, school board members, city council members, state legislatures, state Boards of Education, elected state superintendents or commissioners, state Departments of Education, or the governor's office. You may also lobby at the federal level and speak to your representatives in Congress, representatives of the U.S. Department of Education, or other federal officials.

The skills used in lobbying are not limited to situations where you are trying to influence a government. You can use the same skills when attempting to influence any decision.


Who you lobby will depend on the decision you are attempting to influence. For example, you would not necessarily lobby a city council member on an issue before the state legislature (unless that council member could help you influence the state legislature).



Learning Objectives

After completing this module, participants will be better able to:

- Plan strategic lobbying campaigns
- Create effective messages to and requests of decision makers
- Develop the skills to build effective and efficient lobbying campaign plans

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- Plan strategic lobbying campaigns
 - Create effective messages to and requests of decision makers
 - Develop the skills to build effective and efficient lobbying campaign plans

Learning Objectives

Keep in mind why you're lobbying

Lobbying can seem daunting and—once you're in the thick of it—hectic. The key is to remember why you are there: If you don't speak up for students and public education, who will? The secret to successful lobbying is authenticity. Remember these three things, and you'll do great:

- You're the expert!
- Know your limits
- Play to your strengths

YOU'RE THE EXPERT

You're an expert on education and your local community. You are speaking for your students and your union, both of which you know better than the person you are lobbying. Be comfortable with that knowledge.

KNOW YOUR LIMITS

As the Clint Eastwood character Dirty Harry said, "Know your limits." Don't pretend to have expertise you don't have. Don't ad lib if you don't know something. And if you don't know the answer to a question, say so and explain you will try to get back to the questioner with an answer.

PLAY TO YOUR STRENGTHS

Use lobbying tactics that you are comfortable using. Emphasize expertise and experience in your talking points. Don't be intimidated. For example, decision makers and their staff may sometimes try to establish "superiority" by using technical jargon. Be polite and don't forget that you have a unique experience to share. No matter how they try to change the subject, keep coming back to your message and **THE ASK**.



- You're the expert!
- Know your limits
- Play to your strengths

Keep in mind why you're lobbying

EXERCISE:

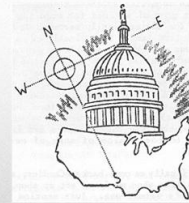
Why are you lobbying?

Think about some issues facing your local association, your worksite, your district, and your state.

Identify up to three issues or causes around which you would like to organize a lobbying campaign.

Describe why you are an expert in these areas.

Identify others who could be helpful to you.



- Think about some issues facing your local, your worksite, your district, and your state.
- Identify one issue or cause around which you would like to organize a lobbying campaign.

EXERCISE: Why are you lobbying?

Issue or cause	Issue or cause	Issue or cause
Why are you the expert?	Why are you the expert?	Why are you the expert?
Who else may you want to have on your team?	Who else may you want to have on your team?	Who else may you want to have on your team?

Know Your Audience

Knowing your audience—who you are trying to influence—is a lobbyist’s primary challenge. Be prepared to teach yourself a refresher course in civics, but rest assured that it gets easier each time you do it.



NARROW THE SCOPE

The first step to successful lobbying is identifying the decision maker (or makers) responsible for your issue. You can convince hordes of people you’re right, but if you don’t convince the final arbiter, your efforts will be fruitless. Identifying the people who make the final decisions allows you to concentrate your resources where they have the greatest impact.

EXECUTIVE DECISION MAKERS

Some decisions are made with executive authority: one person can decide to agree with you or not and then change policy. For example, a state Secretary of Education may have the authority to create rules or regulations that affect you and your profession. Advisors and staff may weigh in on decisions, however, and they can be lobbied. Understanding local decision-making processes and timelines is critical to success.

DECISION CHAINS

Other decisions require a chain of decisions—one after the other in a set order. Anything that must be approved by the legislative branch requires a chain of decisions.

In the case of a state law, one legislator must decide to champion your idea and sponsor legislation. Another group of legislators, the committee of jurisdiction, must then decide to approve the legislation. A third, larger group, the legislative body, must then decide to pass your proposal. Generally, you need the approval of the legislative body’s leadership for your bill to be heard by the body.

When you have accomplished these objectives, you may need to repeat the process in the other legislative body (in bicameral legislatures). Once you have won passage through the legislature, you still need the governor to decide to sign your bill—and that entails another separate, but necessary, decision chain.

EXERCISE: Know Your Audience

Think more about the issues you identified.
Choose one to work on.

Who has the power to change the situation—
one decision maker or many? Is it a legislative
body that requires a chain of decisions? Or is it
an executive decision maker—a single
individual and her team?



First, identify the issue you have chosen and the decision you desire. Then, identify the offices and, if possible, key decision makers for your issue. In a decision chain, identify only the last five steps of the process.

Issue	Decision desired
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Office	Office	Office	Office	Office
Decision maker	Decision maker	Decision maker	Decision maker	Decision maker

Be Prepared

Establishing connections with decision makers gives you credibility: they will understand that you live in their community and are familiar with the day-to-day reality of the students, schools, and families they represent. Direct relationships are best. If you know someone who the decision maker knows, you can use that relationship to connect yourself to the decision maker. Educational, religious, community, and other affiliations are also useful. If you can't think of a connection, ask your colleagues and the staff of your local association. For example, someone you know may have gone to the same high school or college or be a member of the same congregation as the decision maker.



DECISION MAKER'S BACKGROUND

When preparing to lobby decision makers, start where they are. What is their personal and professional background? Where are they from? Do they have children? Are they in public schools? In the limited amount of time you have with a decision maker, this information will help you have a two-way conversation (rather than a one-way delivery of your talking points). Demonstrating that you have invested time in researching the issue and learning about the decision maker will go a long way toward establishing credibility and sincerity. The same theory applies to staff members.

DECISION MAKER'S PRIORITIES

Next, turn to the public life of decision makers. What are their professional needs and challenges? What is their history of involvement in politics? Are they identified with particular issues or voter blocs? Are they independent, pragmatic, progressive, or centrist on certain issues? Do they hold a competitive or marginal seat? If so, responsiveness to your issue could be linked to support or neutrality come election time. Try to find a way to use your cause—or the decision maker's support for your cause—to find common ground.

FINDING COMMON GROUND

It's best to begin and end with areas of agreement. Identify issues where your positions align. When the issue for which you are advocating does not align, respect differences of opinion, but speak up for your position.

EXERCISE: Be Prepared

For your proposed lobbying campaign, choose one decision maker you know a lot about. If you don't know much about any of them, identify someone who might be willing to help you to reach a key decision maker.



Identify everything you know about the decision maker. Next, find connections to you, your team, or your issue to identify common ground between the decision maker and you, a member of your team, or your issue. When you find a connection, highlight it with a star or in some other way.

DECISION MAKER INFO SHEET		
Name	Party	Voting blocs
Committees	Time in office	Date of next election
Previous occupation	Civic engagement	Interests/alma mater
Current residence	Hometown	Spouse
Spouse's interests	Spouse's occupation	Spouse's hometown
Children	Children's schools	Public schools in district
History on your issue		History on public education
Current priorities		Past priorities/successes/failures

Build Relationships

Real relationships are extremely important to long-term success. They take time to build and must be authentic. The best relationships are advantageous to both parties—the kind of relationships we strive to establish.



- Give it time
- Build trust
- Be a resource

Build Relationships

GIVE IT TIME

Healthy relationships take time to develop and must be nurtured. Even the most philosophically aligned decision makers require time to develop comfort and trust with lobbyists. We can establish strong, healthy relationships with decision makers with differing political views, but there is no good way to shortcut the process.

On some issues, you may find it more effective to work in a coalition with other organizations. By doing so, you can provide a broader view of the issues and a larger footprint of support. Your group can be “in front” of the decision maker even when you’re not the coalition representative in the room. Additionally, the coalition can bridge philosophical gaps between the decision maker and your group. Time is still required, but it can be someone else’s time.

BUILD TRUST

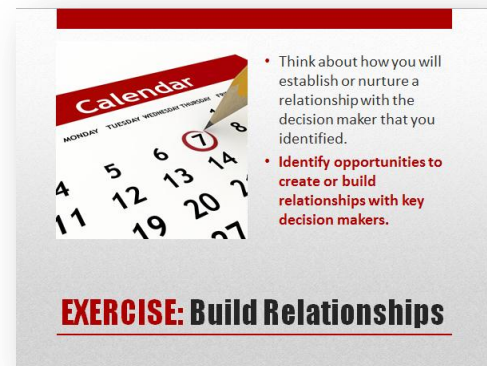
Approaching a decision maker only when you want or need something is not a healthy relationship. To establish a trust, communicate with the decision maker regularly. Be proactive. Request a meeting simply to introduce yourself and your local association. Invite decision makers to events and meetings. Ask them to visit your school for a tour. Be helpful. Look for opportunities to build a relationship by addressing their priorities and goals. Be persistent. Don’t stop building a relationship after one successful meeting. Continue to send invitations to events, speaking opportunities, and photo opportunities.

BE A RESOURCE

Once trust has been established, you may be persuasive or influential simply by providing needed information. Alert decision makers to upcoming hearings or rallies; provide talking points about issues in the news; provide information and research about issues pending before their offices.

EXERCISE: Build Relationships

Think about how you will establish or nurture a relationship with the decision maker that you identified in the “Be Prepared” exercise. One simple way to do this is to think about regularly scheduled activities throughout the year (school events, union events, policy events, etc.). You can include community and political events.



Identify four to six (or more) opportunities to create and build relationships with key decision makers. Place each in the appropriate month below.

January	February
March	April
May	June
July	August
September	October
November	December

Learn the Ropes

Lobbying a decision maker often means lobbying staff members. No matter who you are meeting with, be respectful of their opinions and their time.

WORKING WITH STAFF

You may tend to meet more often with staff than with decision makers. Don't take offense: staff are trusted experts. Legislators are busy and rely on their staff to meet with constituents about important matters. Become a resource for staff on education issues. While they tend to be young (mid-20s to 30s), staff have the ear of their boss. Take them seriously. And treat them with respect: they are the gatekeepers for information flowing to and from the decision maker.

MEETINGS ARE SHORT

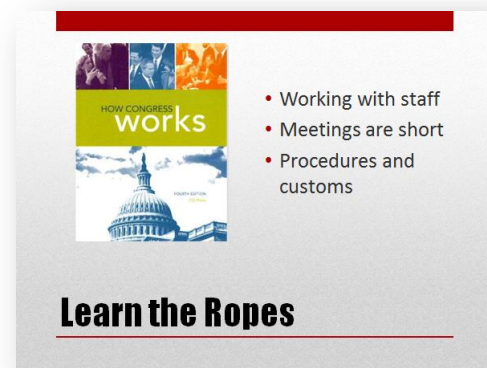
Decision makers' time is in great demand. When you are with a decision maker, expect the meeting to be brief and respect the time allotted. Be organized so you can cover all your talking points, make **THE ASK**, and leave time for questions.

PROCEDURES AND CUSTOMS

As a new lobbyist, you will need to learn the ropes—how each decision maker operates and the office's procedures and customs. Some make appointments for meetings over the phone. Others require requests to be submitted in writing, via emails to the office. Some still require requests to be faxed in. It's important to be persistent and flexible when you request a meeting. While you may get turned down several times you, you will usually get a meeting.

For each decision maker you plan to lobby, set aside time to learn about office procedures and customs. You will need to know who, what, where, when, and how for each office. Almost all of this information can be discovered with a phone call or email to the office.

You should also be ready to explain why the decision maker would want to meet with you. To do so, identify a connection between your issue and the office. Will the decision maker gain something from spending time with you? That can make the difference between getting a meeting or not.



EXERCISE: Learn the Ropes

Imagine that you are planning the first lobbying meeting of your lobbying campaign. You will meet with the decision maker you identified in the “Be Prepared” exercise, invite the decision maker to an event identified in the “Build Relationships” exercise, and deliver a quick summary of your issue.



- Imagine that you are planning the first meeting of your lobbying campaign.
- **Draft a request for the meeting with as much detail as you can.**

EXERCISE: Learn the Ropes

Draft a request for the meeting below. Identify as many of the elements as you can. If you are unsure about one or more elements, identify them as questions.

Issue: _____

Decision maker/desired decision		Meeting location	
Requested date	Requested time	Meeting length	Travel/parking time
Decision maker attendees		Educator attendees	
Purpose of meeting/agenda		Why would the decision maker want to meet with you?	

Know Your Ask

The decision maker may be well versed in the details of the decision you are trying to influence. Your request should be detailed as well. “Support education” won’t get you far with those who aren’t already with you. “Support the inclusion of HB 123 in the education reform bill” is far more effective.



Attempting to influence a decision maker is most effective when your request—**THE ASK**—is specific, tangible, and verifiable:

- **Specific means THE ASK can’t be misinterpreted.** Often, it includes a defined event like a piece of legislation, upcoming meeting, or press conference. Giving decision makers a clear idea of what you want also means they can’t do something less—or something else—and claim your request has been fulfilled.
- **Tangible means THE ASK includes taking action.** The action should be identified clearly enough so the decision maker can do it in the near future—for example, making a public statement or attending an event.
- **Verifiable means you can determine whether an action has been taken independent of the decision maker.** Not all requests can be independently verified—i.e., without asking the decision maker. But when they can, you know for sure whether your effort succeeded.

LESS EFFECTIVE		MORE EFFECTIVE	
Support education	<ul style="list-style-type: none"> ✗ Not specific ✗ Not tangible ✗ Not verifiable 	Vote for HB 123 during your committee meeting next week	<ul style="list-style-type: none"> ✔ Specific ✔ Tangible ✔ Verifiable
Help us out on our budget	<ul style="list-style-type: none"> ✗ Not specific ✗ Not tangible ✗ Not verifiable 	Vote against Commissioner Smith’s funding cut for salaries at the May board meeting	<ul style="list-style-type: none"> ✔ Specific ✔ Tangible ✔ Verifiable
Tell the governor next week at lunch to stop cutting school funding	<ul style="list-style-type: none"> ✗ Not specific ✔ Tangible ✗ Not verifiable 	Remind the governor at lunch next week that our budget has been flat for six years	<ul style="list-style-type: none"> ✔ Specific ✔ Tangible ✗ Not verifiable

EXERCISE: Know Your Ask

Think about the issue that you identified earlier and three decision makers or others that you will need along the way to be successful. What role do you need them to play or decision do you need them to make? In each case, what is **THE ASK**—and is it specific, tangible, and verifiable?



Identify three individuals whose support you plan to seek and THE ASKS you will make. If possible, use what you know about each individual (from the “Be Prepared” exercise) to personalize your requests.

Issue: _____

Name		Role/decision
ASK		
Specific?	Tangible?	Verifiable?
Name		Role/decision
ASK		
Specific?	Tangible?	Verifiable?
Name		Role/decision
ASK		
Specific?	Tangible?	Verifiable?

Support Your Ask

You must be prepared to explain and defend **THE ASK**. Using simple tools and common sense, you can construct a persuasive argument.

FIVE-PARAGRAPH ESSAY

The five-paragraph essay is an easy-to-remember format: **THE ASK** is your thesis; three talking points are your supporting arguments; and a connection between **THE ASK** and the audience is the conclusion. The five-paragraph essay is a simple, proven, persuasive tool that delivers information in a manner familiar to your audience.

ALL POLITICS IS LOCAL

The more closely you can relate your issue to the decision maker's life, the stronger connection you can make between the decision maker and your cause. National and statewide studies and statistics can be helpful, but local perspectives and examples tend to be more effective.

When you can, use local examples to prove your point. It's powerful to pull examples from local newspapers to highlight an issue. For example, if discussing immigration reform, it's more effective to identify statistics about students in the local community who would benefit than to recite national statistics. If you don't have local information already, search the websites of local media outlets for information to strengthen your case. If you are unable to find a direct connection to the decision maker, use the closest data and information you have and connect them to the person.

BE OPEN FOR QUESTIONS

After delivering **THE ASK**, turn the meeting over to your audience. Inquire whether they will do what you have asked, have a position on the issue, or have questions. It's essential to listen, particularly if you are meeting with someone who may not yet agree with your position.

Answering questions is among the best ways to support **THE ASK**. Your audience may have thought of arguments you haven't, and you get a chance to explain or respond to them. Answer all questions to the best of your ability, but don't feel uncomfortable if you don't know an answer. Tell people you will get back to them when you can. Then, quickly find the answer and get back to them. Doing so will build the relationship between your local association and the decision maker.



EXERCISE: Support Your Ask

Flesh out **THE ASK** with as much detail as you can. Think about one of the individuals whose support you would like to have and **THE ASK** you will make. Where you are uncertain about specifics or details, use a placeholder and mark the section so you know to replace it with better information later.



- Think about one of the individuals that you plan to ask to support your cause and the ask that you will make.
- **Flesh out your ask with as much detail as you can.**

EXERCISE: Support Your Ask

Issue _____

Decision maker	Role/decision
ASK/thesis	
Argument #1	Local examples
Argument #2	Local example
Argument #3	Local example
Conclusion/connection	

Not Too Political

To build relationships, you must create connections between your cause and the decision maker. In some cases, this may seem impossible, but you can do it if you focus on students. Explain how a decision will impact students, families, and educators in the decision maker's community. Stress that your preferred outcome benefits the entire community. Always remember to highlight bipartisan efforts, not make demands, and put issues before politics.



- Bipartisan works
- Demands don't
- Issues before politics

Not Too Political

BIPARTISAN WORKS

No decision maker is purely Republican or Democrat, and no two officeholders are the same. Some strongly support most of our issues and others only one or two. Regardless, support from anyone is helpful and welcome. Don't pigeonhole officeholders based on their political party affiliation or their position on an unrelated issue. We have had many successes with bipartisan support, including the removal of "teacher evaluation" requirements from federal Elementary and Secondary Education Act reauthorizations; funding for schools in areas dominated by public lands; and additional funding for education, jobs, and state fiscal relief.

DEMANDS DON'T WORK

Walking into a decision maker's office and saying, "Vote yes on X" can be viewed as confrontational and convey an attitude of entitlement. The decision maker may be taken aback and the relationship damaged. Instead, explain why the decision maker should take a certain position or side with you. Rely on your five-paragraph essay; bring along notes if you need them. You are there to persuade the decision maker that your side is correct.

PUT ISSUES BEFORE POLITICS

No matter who you're meeting with—former president of a union affiliate or first-time-elected state legislator—focus your presentation on issues surrounding **THE ASK**. It's easy to get sidetracked into political matters or other unrelated issues; try to avoid digressions. At best, they will use up time you should be spending on **THE ASK**. At worst, they can damage the relationship.

EXERCISE: Not Too Political

Review **THE ASK** you just wrote. Think about presenting it to a decision maker—a public official with whom you disagree on nearly every issue. Imagine that you will be meeting with that decision maker and making your case.

Determine how political your ASK is. How can you ensure your message is heard despite disagreements or animosity that may exist?



- Think about presenting your ask to a public official with whom you disagree on nearly every issue.
- **Determine how political your ask is.**

EXERCISE: Not Too Political

How can you focus your message on the students who would benefit?

Which elements of your ASK are bipartisan or nonpartisan?

Which elements could be considered partisan?

How can you make your ASK so it is not viewed as a demand?

How would you change your message when speaking to a liberal Democrat?

How would you change your message when speaking to a conservative Republican?

Use Your Tools

It can't be said too many times: Our success depends on building relationships with decision makers. You already have the tools to do the job. Use them.

FIRST AND LASTING IMPRESSIONS

Always remember: first impressions last. Dress professionally when lobbying. Be friendly, outgoing, and polite to everyone you meet, from the receptionist to staff to the decision maker. And don't be late. Time is the most valuable resource most decision makers have. By respecting their time, you are demonstrating that you respect them. A strong first impression will pay dividends in the long term as your relationship grows and develops.

BE PROACTIVE

NEA regularly encourages decision makers to get to know NEA members in their communities. But you should reach out to them, too. Invite decision makers to town halls on issues that you care about. Invite them to come to your classroom or worksite. Experiences like that are powerful and give decision makers stories to share. They provide context, which helps decision makers envision how proposals affect the students and families they represent. They also help decision makers appreciate what our members go through every day.

An event doesn't need to be elaborate or have a strict agenda—it can be as simple as coffee with you and your colleagues. Be sure to invite decision makers well in advance, as their schedules are likely to fill up quickly.

KEEP IN TOUCH

Hit-and-run lobbying doesn't work. Keep in touch with decision makers and continue the dialogue. You don't need to become a regular in their office; you can attend public events and use the Internet. Follow decision makers on Twitter; subscribe to their online newsletters; and regularly check their Web and social media sites (e.g., Facebook). Where appropriate, interact with them online. Not all decision makers personally monitor online activity. But staff do, and they report back.



- First and lasting impressions
- Be proactive
- Keep in touch

Use Your Tools

EXERCISE: Use Your Tools

You have identified a decision maker with whom developing a relationship could prove challenging. Think more about that relationship and how you can use your tools to build a working rapport. Review the calendar you developed in the “Build Relationships” exercise and find three to five opportunities to be proactive in building your relationship.



- Think more about a relationship with a decision maker and how you can use your tools to build a working rapport with that person.
- Create a schedule for events that you will invite the decision maker to attend.

EXERCISE: Use Your Tools

Create a schedule of events that you will invite the decision maker to attend. For the contact date, subtract two weeks to two months from the invitation date. Schedule **THANK YOU**. Identify how often your team will keep in touch, the person be responsible for each type of contact, and how often you will make it.

CONTACTS WITH DECISION MAKER

EVENT	CONTACT DATE (ESTIMATED)	INVITATION DATE	THANK YOU DATE

KEEPING IN TOUCH

METHOD	NAME	DAILY	WEEKLY	MONTHLY	OTHER
Face-to-face meetings					
Direct inquiries about public events					
Social media sites					
Newsletters					
Other (identify)					

Be Yourself

Above all, relax. Always remember that you are an expert at educating children. You have the tools necessary to champion your issues.

YOU KNOW PEOPLE

Lobbying can be intimidating—even for professionals. Fundamentally, it is a people business.

It's easy to imagine that decision makers must be different or special to hold their positions. Always remember: they're just people, and you know people.

Decision makers have good days and bad days—just like you, the students we serve, and everyone else you know. They are generally trying to do the best job they can. You may meet some who believe they are special and deserve special treatment. In all likelihood, you have met students, parents, or colleagues like that, and you know how to handle them.

YOU HAVE PEOPLE SKILLS

Teaching a diverse group of students and interacting with their parents creates an understanding of the human experience—what is real and what makes things true. It's what you do in the classroom, in a friendship, and when you're building membership in your local association. Use that tool when you're lobbying and you'll perform at your best.

YOU HAVE A SUPERPOWER: YOUR STORY

Good stories can touch decision makers' hearts and connect them personally to your cause. Great stories will be adopted by the decision maker for their personal use. You have a story, too. Practice telling it to others to refine it. Use it when meeting with decision makers to demonstrate educators' power to change and improve lives.



EXERCISE: Be Yourself

Imagine that a decision maker you invited to an event is coming. You will have about five minutes to talk to the decision maker before it begins. You will deliver **THE ASK** during the event. What will you say before the event begins?



- Think about your issue. What stories can you tell that support your position?
- Write a story to support your issue.

EXERCISE: Be Yourself

Write a story to support your issue. Use the dramatic arc to structure it: exposition (background and characters), rising action (events leading to the climax), the climax, and falling action (the outcome). Don't forget to connect your story to your issue.

Issue _____

Background	Characters
Events leading to the climax	Climax
Outcome	Connection to your Issue

Lobbying Action Plan

Organization _____ Date _____

Plan preparer _____

SITUATION OR GOAL	TEAM MEMBERS

[illegible]

SCHEDULED EVENTS			
January	February	March	April
May	June	July	August
September	October	November	December

THE ASK
ASK/thesis
Argument #1
Local examples
Argument #2
Local examples
Argument #3
Local examples
Conclusion/connection