

HCAO Constituent-Lobbyist Meetings with Legislators

Meeting face-to-face with a legislator (L) is an essential part of lobbying. In such meetings, you can present your issues and views directly, away from the eyes of his/her colleagues. Face-to-face meetings are less formal and have the potential to be engaging and memorable. Through successful encounters of this kind, your group can establish an ongoing and productive relationship with an individual L.

Note: it is common that you will have an appointment with a L but only get to meet with the L aide. Talk with the aide. The aide can become a good lobbyist for your cause. If you don't have a good answer, say so and promise to get back to the L.

An open and frank discussion of your issue may shed new light on the matter for both of you. As a lobbyist, you will get feedback that may help you to refine your arguments and presentation. It is also useful to get a sense of how the L and his/her party views the issue you are raising.

Arranging the meeting(s):

- Find out how to contact the Ls at:
<https://www.oregonlegislature.gov/FindYourLegislator/leg-districts.html>
- Make the appointment and determine how much time is available so you.
- Plan your formal presentation to take up half of your allotted time (thus allow for discussion).

Preparing for the meeting:

- Learn about your legislators (use Votesmart link and the checklist on page 4)
<http://votesmart.org/candidate>
- Determine what is likely to be their stance on health care for all. Do they appear to be a champion, a supporter, lukewarm, undecided, opposed, or a champion of the opposition?
- If possible find out who their biggest supporters are and be able to frame your statements to show how the HCAO bill benefits their constituents and their supporters.
- If a Democrat, it may help to remind them that the #3 issue in the 2014 platform is “establish a comprehensive, equitable, affordable, high quality, universal, single-payer health care system funded by progressive taxes and open to patient choice of providers.”
- If a Republican, it may help to read the following:
 - <http://blog.cardiosource.org/post/i-am-a-republican-can-we-talk-about-a-single-payer-system-2/>
 - <http://chronicle.augusta.com/opinion/opinion-columns/2013-06-23/republicans-should-back-single-payer-health-care-system>
- Organize your group:
 - Choose a spokesperson who is in charge of the discussion, makes sure all the points are covered, and lead any runaway conversations back to the point.
 - Choose two or three main speakers go into the L's office. Others can show strength of numbers in the hall and 1-2 more enter L's office if room available.
 - Make sure your meeting participants understand and agree on the ground rules before you have the meeting with your legislative representative.
 - Agree on the order of speaking and the issue each speaker will address.
 - Speaker # 1 Prepares a brief written summary to hand to the L: your concern, your organization's relevance, and your credentials or career background. You may also present longer documents, but the written summary is crucial.

- Speakers # 2 and 3 prepare compelling stories, their own or that of someone they know, and be able to tell it in one minute, including how the HCAO bill will correct the problem.
- Speaker # 3 , possibly 4 , and 5), same as speaker #2
- Choose a wrap-up speaker who will present an “ask” of the L to:
 - ☑ Co-sponsor our legislation
 - ☑ Lobby their colleagues to co-sponsor our legislation
 - ☑ Speak publicly about the need for the HCAO plan.
- Have facts, figures, legislative and regulatory history, and backup materials in case you need them and as time allows. This will demonstrate the seriousness of your purpose to the legislator or staff, and it will add to your confidence. Make your arguments persuasively but be aware of the pressures on legislators and their world of competing priorities.
- Rehearse your presentation (to each other or just in front of the mirror).
- Assign someone to take notes.

The meeting:

- Arrive 5 minutes early.
- Ask again how much time the L has. You need to be prepared for a shorter meeting than originally agreed upon.
- Note-taker begins to take notes
- Speaker # 1 - Introduces others in party and explains reason for visit, etc.(see above).
- Speakers #2 - 3 or more tell their one minute stories.
- Keep your conversation focused on a 2-3 basic points. If the L changes the topic, gently return to your main point, i.e., better care for more people at lower cost.
- Ask the L if he/she has any questions and do your best to answer them. If you do not know the answer, say so and offer to find the answer and get back to him/her.
- Compliment the elected official. If you approve of a vote s/he has cast or a statement she/he has recently made, say so.
- Don't lose your temper. Don't get angry, discourteous or sarcastic. On rare occasions, a L is hostile to your concerns. If that is the case, reiterate your key points and end the meeting.
- Assume that the L has the highest motives in serving his/her constituents. Don't insult, berate, or impugn.
- Ask for a commitment, something concrete to show support for your issue (see “ask” by wrap-up speaker above)
- Don't take rejection personally. There will be times when an elected official can't support your issue. But that same elected official may become an ally another time.
- If L is clearly opposed to your view, your goal changes. It now becomes to neutralize his/her rhetoric in his/her conversations with others, help him/her remember you as a concerned constituent with a valid concern and perspective.

After the meeting with the Legislator

- Debrief, help note-taker fill in blanks.
- Write a thank you note and follow-up letter that confirms any promises the L made.
- If there were requests for more information, make sure they are followed up on.
- Keep a record of what was said at the meeting and give a copy to a HCAO Board member. It should include comments the L made and any commitments. These notes can be useful for preparing for future meetings, holding the L to the position he/she enunciated, and tracking where various Ls stand.

More Ideas in Preparing for a HCAO Legislative Visit

Know Your Legislator

Your familiarity with a legislator's interests, politics and positions on issues will lead to a more productive visit. Before the visit, try to know the following:

- Political Party: Republican _____ Democrat _____ Other _____
- Ideology: Conservative _____ Liberal _____ Moderate _____
- District # ___ Rural ___ Urban ___ Mixed ___ Business ___ Labor ___ University ___
- How long has legislator served to date? _____
- Leadership:
Committee Chair _____ Subcommittee Chair _____

Ways & Means _____ Public Safety _____ Senate Judiciary _____ House Judiciary _____

What bills has she/he supported that are consistent with/opposed to our goals

- Resist the temptation to tell the legislator everything you know about the issues. Begin with the highest priority in case the legislator gets a call to the floor to vote or to a committee meeting unexpectedly and you can't finish the meeting. Be prepared with backup in case someone wants to know it all!
- Practice your presentation before people who are unfamiliar with your issues. They may point out inconsistencies or lack of information that you may have overlooked.
- Tell the legislator what you want and what to do about it. They are too busy to keep track of all pending legislation and regulatory issues. Don't make them guess.
- If a legislator gets aggressive and puts you on the defensive about a point, be sure to stay calm. You might want to say, "This is an important issue - could I quickly run through the rest of these points and then come back to this so that we can discuss it more - we'd like to get your point of view." Generally, this will be agreeable to a legislator. If he or she insists on proceeding anyway, you may have to let your other points fit in later if there is still time left. Diplomacy is your best defense. It is important to be positive.

Practice Makes Perfect

- Time your presentation, keeping in mind that there will probably be questions and probably won't go completely as planned. Have your backup points ready in case you get lucky and hit an easy schedule day where you suddenly find yourself with an extra 15 minutes or more.
- Make sure your meeting participants understand and agree on the ground rules before you have the meeting with your legislative representative. You will need to choose a spokesperson who is in charge of the discussion, makes sure all the points are covered, and lead any runaway conversations back to the point. Although every member of the group may wish to be part of the presentation, this can lead to chaos. It is important to have one person in charge.

- Don't get distracted—it's easy to chat about mutual acquaintances or other ties and find your time has suddenly disappeared. Try to keep introductory comments brief. If a legislator shows a real interest in one of your points, don't cut him or her off just to make it through your list.
- Don't get discouraged if the legislator gets called away and you get assigned to a staff member instead. Staff often has considerable influence over which bill a Member decides to cosponsor, the writing of public statements, or the formulation of ideas for public policy positions. A staff member can be your ambassador too.

Rules to Follow

- Be on time. A legislator is busy. Generally, you have a 15-20 minute appointment, and if you miss your window, you will probably not be able to reschedule another appointment.
- Introduce yourself and identify your hometown. Wear nametags so that the person you are meeting with feels more familiar with you (and in case he or she forgets your name). It is often helpful to share news about specific recent developments or needs in the district/state.
- Dress comfortably. Wear a red T-shirt, preferably one with an HCAO message on it. You may have to do a lot of walking in changeable weather conditions; but remember you are representing your organization and dress accordingly.
- Be careful not to convey negative attitudes about politics or politicians, even if you hold private doubts. Remember that most legislators and staff are hard working even though you may not agree with their point of view. Be sure to express appreciation for past support.

Feedback is Important

Share experiences with other members after your visits have been completed so that you can learn from each other for the next time. This may help you and your group to understand a particular member or identify common questions and arguments that are effective.

You can't expect to accomplish your purpose by meeting once with your legislator. Remember, this is a marathon, not a sprint. Legislators like to meet the people they represent and to get to know their concerns.

Other things to do in addition to writing a follow-up/thank you letter.

- Look for other opportunities to write a letter, such as, before your visit requesting an appointment, informing the legislator of a new and exciting development in your area, reminding him/her of the Health Care For All Oregon especially during key legislative or agency actions.
- Invite the legislator to visit your business. This as an opportunity to get a photo with the local newspaper and to show the legislator what you do.
- Meet with the legislator when he or she is in your hometown as well as when you visit the Capitol.
- Legislators frequently hold district "town hall meetings" on weekends.
- Take every opportunity to let the legislator know about Health Care For All Oregon issues.

Get to know the legislator's staff. Just stop in to say hello to district staff when you are in the area, even if you don't schedule an official meeting.